JULY 1990

COMMERCIAL CARRIER JOURNAL

CCJ

FOR PROFESSIONAL FLEET MANAGERS

THE TOP 100

Annual Ranking Of The Largest For-Hire Carriers

Also:

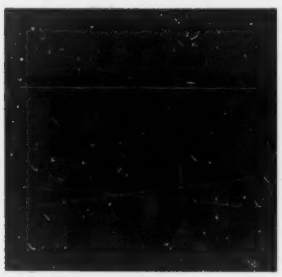
- The Second [illegible]
- [illegible]

EXCLUSIVE

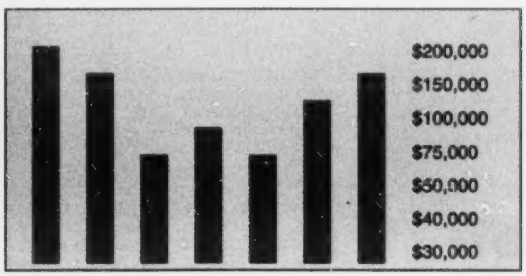
CHILTON'S
CCJ
COMMERCIAL CARRIER JOURNAL
VOLUME 146 NUMBER 7 JULY 1990

TABLE OF CONTENTS

FEATURES	THE TOP 100 Financial rankings of largest for-hire motor carriers	54
	INDUSTRY TRENDS & STATISTICS 1989 market stats; equipment sales figures; forecasts	71
	SALARY SURVEY: WHERE THE MONEY IS! Compare salaries with your peers. Where do you stand?	96
COLUMNS	Editorial / Fast food and professionalism	9
	Washington Report / Statistics don't always add up	37
	Business Side / Data buttresses need for deregulation	39
	Safety / Who's next to die for cheap bolts?	49
	Maintenance & Technology / Protect your rear...axle	103
DEPARTMENTS	Industry Watch	12
	Truck Talk	44
	Classified Advertising	151
	Advertisers' Index	155
	Sideroads	156
PRODUCTS	New Products And Services	111
	Publications	150
POSTCARDS	Truck Talk Card	45
	Reader Service Cards	125
	Subscription Cards	127



Page 54



Page 96

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IN THE NEXT ISSUE

In preparation for the August cover story on drug testing, CCJ visited two specimen collection agencies, government-approved laboratories and medical review officers. We also surveyed many of the carriers that came under the federal testing mandate last December. Based on information gleaned from those efforts, we will provide time-andcost-saving insights and updates on regulatory changes for carriers that are already testing, as well as fleets that will initiate their programs this Fall.

The issue also will include a technical report on ways to interpret tread wear patterns and tire failures, and how to improve tire PM.

And the August edition will have a product review of dozens of domestic and imported light-duty trucks. □

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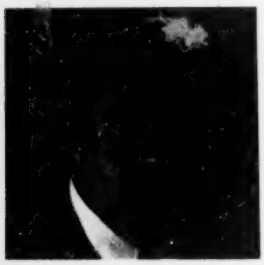


Delaney's data buttresses need for deregulation of trucking in states

By PARRY DESMOND Executive Editor 215-964-4529

Some folks call Robert Delaney "Dataman." Delaney, vice president of Cass Logistics Inc., earned that characterization because his overpowering statistical analysis often refutes the hyperbole trucking industry leaders use to support feeble claims.

Cass Logistics of St. Louis, Mo., provides freight bill payment, audit and rating services, and software to 700 major clients, including 31 Fortune 100 companies.

At a Washington, D.C., press conference in June, Delaney concluded his presentation by asserting that a proposal to eliminate states' regulation of trucking will die in the House of Representatives.

Delaney's impassioned conclusion was based on his analysis of how deregulation of trucking cut U.S. business' transportation and inventory carrying costs by 22% —$65 billion—between 1982 and 1987.

According to Delaney, the two ways that reduction was accomplished were:

1. Transport costs decline by $35 billion

Between 1975 and 1981, trucking mileage increased 10.7%, while the gross national product grew only 3.2%. But with deregulation between 1981 and 1985, mileage increased 2.5%—essentially in direct proportion to the GNP's 2.4% growth.

That resulted in improved equipment utilization, which cut the number of heavy-duty tractors in operation from 1.4 million in 1980 to 1.1 million units in 1985. And in the same time frame, tractor production slid from 180,000 units to 130,000.

Since 1986, vehicle replacement has been stable as units are produced and sold in direct relation to economic conditions.

To reflect how deregulation has heightened competition, Delaney cited the number of motor carriers that have 48-state contiguous operating authority. They grew from none in 1980 to 5,000 fleets with nationwide authority in 1980.

By taking advantage of those new options, U.S. business' transportation costs declined from an average of 8.1% of the gross national product in the 1970s to 6.3% of the 1989 GNP.

2. Inventory costs down $30 billion

In the late 1970s, said Delaney, "transportation service was so poor and delivery so unreliable" that a larger proportion of stock had to be inventoried in order to respond to customer service complaints. As a result, variable transit time during the 1970s accounted for 40% of the lead time customers required in inventory replenishment formulas.

As a result of deregulation, transit time "is a fraction" of what it was between 1977 and 1981. And with reliable transportation, less inventory is required at fewer locations.

That means $200 billion is no longer locked into inventory investment. And, based on a minimum 15% carrying rate, that $200 billion inventory reduction translates into a $30 billion savings in inventory carrying costs.

Hastert bill a "kick-start"

"But business logistics costs have been on a plateau since 1988...and inflation is gradually building," continued Delaney. To give logistics efficiency a "kick-start," he champions HR 4261, the deregulation bill introduced last year by Rep. Dennis Hastert (R-Ill.)

While many truckload fleets support the proposal, claims Delaney, opposition to HR 4261 is led by "a group of tariff publishing bureaus and most, but not all, motor carriers serving the less-than-truckload market."

LTL carriers' political power is "out of proportion to the role that they play within our economy," said Delaney.

He acknowledged that LTL carriers control of 25% of for-hire trucking revenues. However, he noted that, when regulated and private carriage freight revenues are combined, LTLs' clout declines to 12% of the total market. And when other intercity modes —such as rail and barge—are included in the freight revenue pie, LTLs' slice represents only 8% of the total. □

For-Hire Carriers' 1989 Revenues by Market Segment

Segment	$ Billions
Truckload (gen'l freight)	$24
Less-Than-Truckload	18
Parcel Delivery	11
Bulk Commodities	5
Household Goods	5
Motor Vehicle Haulers	3
Refrigerated Transport	3
Building Materials	2
Heavy Machinery Haulers	1
TOTAL	**$72**

Source: State of Logistics Report prepared by Robert Delaney, Cass Logistics Inc.

THE TOP 100

Annual Ranking Of The Largest For-Hire Carriers

Also:

- *The Second 100*
- *Indu*

'89 REVENUES & PROFITS: SLOW AND LOW

For-hire carriers had to cope with a financial double whammy in 1989: a sluggish economy plus devastating fuel price increases in December. As a result, the Top 100's composite net income plummeted 27.6%. But Werner Enterprises and New Penn Motor Express proved that 1989 wasn't a slow and low year for all fleets.

By PARRY DESMOND, *Executive Editor*

Text starts on page 61

Less-Than-Truckload Common Carriers of General Freight

AAA COOPER TRANSPORTATION, DOTHAN, AL	$ 136375	$ 122913	$ 13462	90.1	$ 6408	$ (1751)	$ 21	$ 5282
ABF FREIGHT SYSTEM INC, FORT SMITH, AR	630144	610886	19257	96.9	7679	(25247)	(3329)	(10340)
ANR FREIGHT SYSTEM, INC., DENVER, CO	416348	438546	(22198)	105.3	2926	(3186)	(10735)	(17575)
A-P-A TRANSPORT CORP., NORTH BERGEN, NJ	133347	123787	9559	92.8	2658	1645	839	7707
ADVANCE TRANSPORTATION CO., MILWAUKEE, WI	102989	100193	2795	97.3	2105	137	220	607
ARKANSAS FREIGHTWAYS, HARRISON, AR	97593	89756	7838	92.0	1931	677	2522	4062
AVERITT EXPRESS, COOKEVILLE, TN	113097	105055	8042	92.9	1845	(17)	2320	3860
BROWN TRANSPORT CORP., CHARLOTTE, NC	190193	199282	(9089)	104.8	10226	(2850)	0	(22165)
CAROLINA FREIGHT CARRIERS, CHERRYVILLE, NC	538889	531399	7490	98.6	4821	(426)	810	1433
CENTRAL FREIGHT LINES, INC., WACO, TX	213259	201657	11602	94.6	2144	1143	3241	7360
CENTRAL TRANSPORT, INC., STERLING HTS., MI	278816	277979	837	99.7	2078	277	179	(1143)
CHURCHILL TRUCK LINES, CHILLICOTHE, MO	145009	141827	3182	97.8	266	887	1474	2329
CON-WAY TRANSPORTATION SVCS., PORTLAND, OR	383418	328980	54438	85.8	2699	(56)	23608	28075
CONSOLIDATED FREIGHTWAYS, PORTLAND, OR	1894950	1800115	94835	95.0	9026	4906	32819	57896
ESTES EXPRESS LINES, RICHMOND, VA	89937	78698	11239	87.5	163	878	4318	7636
G.I. TRUCKING COMPANY, LA MIRADA, CA	84258	81805	2453	97.1	2685	(160)	(145)	(247)
HYMAN FREIGHTWAYS, INC., MOUNDS VIEW, MN	91144	89360	1785	98.0	876	162	160	911
JONES TRUCK LINES, INC., SPRINGDALE, AR	218093	211341	6752	96.9	8430	1409	892	(1161)
MERCHANTS FAST MOTOR LINES, ABILENE, TX	99785	98418	1366	98.6	0	1	465	902
NEW PENN MOTOR EXPRESS, LEBANON, PA	113274	90648	22626	80.0	55	4734	9471	17834
NORTHWEST TRPT SERVICE, COMMERCE CITY, CO	181519	170058	11461	93.7	231	1882	5118	7994
OLD DOMINION FREIGHT LINE, HIGH POINT, NC	127690	121433	6257	95.1	4638	(183)	140	1296
OVERNITE TRANSPORTATION CO., RICHMOND, VA	697783	634837	62947	91.0	766	9434	24033	47582
PRESTON TRUCKING COMPANY, INC., PRESTON, MD	366938	362579	4359	98.8	5082	427	(199)	(97)
ROADWAY EXPRESS, INC., AKRON, OH	1835496	1751679	83817	95.4	6083	8759	29200	57293
SAIA MOTOR FREIGHT LINE, HOUMA, LA	85617	73820	11798	86.2	5115	(271)	2757	3655
ST. JOHNSBURY TRUCKING CO., HOLLISTON, MA	313552	285732	27821	91.1	4229	(1150)	11048	11394
SOUTHEASTERN FREIGHT LINES, COLUMBIA, SC	129389	118819	10570	91.8	313	178	64	10371
TNT HOLLAND MOTOR EXPRESS, HOLLAND, MI	206241	184797	21444	89.6	2	61	9395	12108
TNT RED STAR EXPRESS, AUBURN, NY	146035	138708	7327	95.0	351	607	2875	4708
TRANSUS, INC., ATLANTA, GA	70536	70150	386	99.5	9	8606	30	8953
UNITED PARCEL SERVICE—OH, GREENWICH, CT	7249363	6820481	428882	94.1	995	(3273)	146720	277894
UNITED PARCEL SERVICE—NY, GREENWICH, CT	2803091	2760730	42361	98.5	71	(5201)	20230	16859
VIKING FREIGHT SYSTEM, INC., SAN JOSE, CA	226074	205394	20680	90.9	3567	373	6523	10963
WATKINS MOTOR LINES, INC., LAKELAND, FL	203677	193625	10052	95.1	2918	(3252)	1661	2221
WILLIG FREIGHT LINES, SAN FRANCISCO, CA	79212	74295	4917	93.8	2856	37	440	1658
YELLOW FREIGHT SYSTEM, OVERLAND PARK, KS	2189638	2152764	36874	98.3	11182	24891	7705	42878
TOTAL: LTL GENERAL FREIGHT	$22882769	$21842546	$1040224	95.5	$117429	$25088	$336890	$610993

(all dollar amounts in thousands)

3.87%	$ 15943	$ 49086	$ 11298	$ 11952	$ 7510	$ 4056	$ 3705	$ 2336	$ 8871	$ 8156	970
(1.64)	67096	258077	95409	50467	53988	23819	12192	10369	31300	8169	2618
(4.22)	38065	165031	74498	43289	36780	15818	13681	8153	4122	39109	2640
5.78	12923	51189	18990	10571	13585	2566	3602	3272	5927	1162	733
0.59	8353	38584	16608	8700	5089	3448	3742	1417	2410	11842	944
4.16	8006	23828	6671	4725	26128	2960	3515	1806	4346	8771	711
3.41	10408	36811	8747	13111	10709	2682	1685	2353	7314	11235	1292
(11.65)	24005	75404	18705	18345	17120	8490	6599	4294	12487	13833	1780
0.27	51453	226080	87217	43416	25595	15954	14456	7591	28326	31510	2558
3.45	11631	99052	24717	20794	16005	8781	4319	2983	11327	2048	2662
(0.41)	14931	30907	12404	3017	8579	3120	5806	1911	5324	191980	4762
1.61	13058	55143	19391	16382	6281	5127	2660	2240	5817	15728	807
7.32	47657	127610	37861	30158	32471	13125	9689	7379	21891	1139	2493
3.06	170617	736409	293059	173127	117257	62873	50044	24747	84835	87147	6957
8.49	8620	37575	8138	7796	3310	3502	2397	1672	5224	444	870
(0.29)	8979	25248	9256	4851	7241	2501	3050	1233	4172	15274	386
1.00	7163	27302	10869	5861	23839	2476	1972	1480	2212	6186	602
(0.53)	16666	99084	34351	19171	20305	6575	3958	3014	4490	3727	1397
0.90	7470	37326	14618	9445	13455	3870	2754	1788	373	7319	1099
15.74	9698	38536	15787	9161	4941	2960	2518	1508	4849	690	688
4.40	19198	64713	25227	15044	21940	6164	3176	1669	405	12522	770
1.01	13353	34087	8536	12081	9215	3857	7786	2440	5419	24659	1000
6.82	60030	294790	68055	81921	29827	31347	17320	12870	24557	14120	4562
(0.03)	28110	165364	58758	33409	22007	11045	10090	5817	14302	13677	2222
3.12	195890	714976	280869	161604	117193	56808	41289	27545	100014	55491	6914
4.27	5815	28158	7202	6414	3713	3537	2429	1451	6175	8926	827
3.63	23202	135260	51007	24919	14879	7772	5632	4036	7946	10079	1868
8.02	11336	53584	13001	12552	10502	3855	3078	2110	6107	2894	1201
5.87	16542	86871	29991	19110	5935	7105	3528	2192	6008	7515	1730
3.22	15351	60441	26356	11826	7517	4061	2892	2808	4304	3152	779
12.69	6472	24292	5382	7374	3954	1778	2890	1783	1619	14606	793
3.83	828543	2894495	1116017	463701	604673	93897	126729	97961	223370	371095	}13499
0.60	349939	1148229	491661	160819	264529	29756	59236	44086	82434	130041	
4.85	26899	76438	23724	18934	19302	7470	6622	3842	13332	8831	1311
1.09	21215	46592	13929	12928	19193	4923	6856	4205	3307	60477	724
2.09	6646	31247	12002	8881	3677	3697	1931	886	4517	810	551
1.96	206236	901247	395024	204505	119243	74790	51792	30723	124759	44445	8413
2.67%	$2387519	$8999066	$3445335	$1760361	$1726109	$546565	$505620	$338970	$884192	$1248809	84133

38055	36018	—	—	2037	336	0.888	781	189	1836	21	8.1
204465	202402	11	—	2052	1173	1.088	1956	662	4054	75	14.9
132238	99055	11380	7547	14256	569	1.211	1691	949	4004	79	10.1
14065	14065	—	—	—	248	1.497	590	143	1649	13	12.9
26384	10877	341	15166	—	258	1.186	554	390	1037	33	9.2
28069	25438	2631	—		359	1.008	562	148	1230	22	9.1
57774	10305	3648	43821		NA	0.574	615	677	1175	52	NA
71743	63504	7675	—	564	508	NA	943	836	1456	68	12.6
162457	137180	1925	—	23353	803	1.028	1962	596	4488	65	10.6
62490	61417	—	—	1073	208	0.875	1202	1460	3115	97	8.6
88650	51	88599	—	—	152	2.628	2590	2173	4349	205	8.2
45037	36842	5351	—	2844	617	1.114	618	189	1155	21	10.2
76481	76311	144	26	—	276	1.318	2003	490	4238	60	9.0
598950	545659	12469	4801	35952	1377	1.182	5309	1648	12723	183	14.8
20283	20283	—	—	—	200	1.015	573	297	1160	28	8.6
20762	6007	5281	812	8662	765	NA	302	84	798	10	14.2
205050	16365	566	6739	1380	459	1.138	419	184	899	16	10.4
57421	57421	—	—	—	423	1.013	1109	288	2234	33	10.3
29021	—	—	29021	—	280	NA	523	576	1144	42	10.6
16465	16465	—	—	—	222	NA	539	149	1142	16	9.3
56534	—	1101	54316	1117	1295	1.173	514	256	1110	24	17.3
44723	31147	13318	257	—	345	1.005	624	375	1138	60	7.7
265865	259033	—	—	6832	650	0.871	3044	1518	6669	142	10.8
79278	71757	—	—	7521	374	1.254	1614	608	3368	69	9.0
540293	482999	911	—	56383	1197	1.176	5336	1578	13094	179	14.1
23280	23280	—	—	—	254	0.973	456	371	1019	28	9.0
59314	49314	—	—	—	296	1.109	1389	479	3354	45	9.3
44985	44985	—	—	—	256	0.512	830	371	1838	34	6.8
49903	49903	—	—	—	260	1.193	1291	439	2227	49	9.0
20285	20285	—	—	—	200	1.295	675	104	1746	13	7.7
24559	12142	5262	2146	5009	373	0.871	383	410	857	33	8.6
}168756	}1666422	}20334	—	—	NA	NA	}13499	—	}2507911	—	NA
63835	63835	—	—	—	572	1.029	789	522	2137	51	11.8
95749	43588	52161	—	—	1547	0.810	559	165	1081	20	11.7
17934	17731	204	—	—	443	1.446	372	180	709	18	13.6
692919	654721	136	—	38062	1264	1.106	6887	1527	15836	201	14.5
5542072	4936807	233448	164652	207097	729	1.125	63103	21031	2617980	2105	12.5

Other Trucking Segments

(all dollar amounts in thousands)

TRUCKLOAD GENERAL FREIGHT									
ACE TRANSPORTATION, INC., LAFAYETTE, LA	$ 89271	$ 86946	$ 2326	97.4	$ 721	$1608	$ 1179	$ 2034	2.28%
BUILDERS TRANSPORT, CAMDEN, SC	228229	224165	4063	98.2	12012	5222	(564)	(2163)	(0.95)
COUNTRY WIDE TRUCK SERVICE, POMONA, CA	71077	80274	(9197)	112.9	3107	0	(911)	(11393)	(16.03)
CRETE CARRIER CORP., LINCOLN, NE	111757	106414	5343	95.2	213	880	845	5165	4.62
DART TRANSIT COMPANY, ST. PAUL, MN	90771	85691	5081	94.4	2005	366	88	3354	3.70
DONCO CARRIERS, INC., OKLAHOMA CITY, OK	69774	70747	(973)	101.4	0	(747)	96	(1816)	(2.60)
C.R. ENGLAND & SONS, SALT LAKE CITY, UT	73881	69404	4477	93.9	2598	608	81	2406	3.26
FREYMILLER TRUCKING, INC., BAKERSFIELD, CA	69151	62891	6260	90.9	3420	22	1061	1801	2.60
GEMINI TRPTN. SERVICES, GREENSBURG, PA	90163	87549	2613	97.1	173	(895)	634	911	1.01
J.B. HUNT TRANSPORT, INC., LOWELL, AR	509278	447527	61751	87.9	9418	0	21718	30615	6.01
M.S. CARRIERS, INC., MEMPHIS, TN	96813	81397	15416	84.1	2078	220	5235	8323	8.60
MISSOURI NEBRASKA EXPRESS, ST. JOSEPH, MO	123586	131203	(7617)	106.2	4148	505	(3908)	(7352)	(5.95)
MUNSON TRANSPORTATION, MONMOUTH, IL	99645	95185	4459	95.5	4424	207	41	201	0.20
NATIONAL FREIGHT, INC., VINELAND, NJ	144405	139162	5243	96.4	4035	0	2057	(849)	(0.59)
NEW PRIME, INC., SPRINGFIELD, MO	78599	70290	8309	89.4	3020	168	130	5327	6.78
P.A.M. TRPTN. SERVICES, TONTITOWN, AR	70122	75282	(5160)	107.4	3328	150	(1494)	(6844)	(9.76)
PENNSYLVANIA TRUCK LINES, WYNNEWOOD, PA	82766	82637	130	99.8	290	485	1256	(931)	(1.12)
RANGER TRANSPORTATION, JACKSONVILLE, FL	203245	197771	5474	97.3	3311	172	972	1363	0.67
ROADRUNNER TRUCKING, ALBUQUERQUE, NM	81058	69431	11627	85.7	113	(39)	100	11375	14.03
RYDER DISTRIBUTION RESOURCES, MIAMI, FL	281502	285969	(4467)	101.6	0	(161)	51	(4679)	(1.66)
SIGNAL DELIVERY SERVICE, CLEVELAND, OH	230995	221048	9946	95.7	5176	2	3677	1095	0.47
UNIVERSAL AM-CAN, LTD., STERLING HTS., MI	87874	90099	(2225)	102.5	95	130	(382)	(1808)	(2.06)
WERNER ENTERPRISES, OMAHA, NE	251575	219977	31598	87.4	4278	417	10956	16781	6.67
TOTAL—TRUCKLOAD GENERAL FREIGHT	$3235537	$3081059	$154477	95.2	$67963	$9326	$42918	$52916	1.64%
TANK TRUCK									
CHEMICAL LEAMAN TANK LINES, EXTON, PA	$ 207362	$ 201842	$ 5520	97.3	$ 5919	$ 354	$ 539	$ (584)	(0.28)%
DSI TRANSPORTS, INC., HOUSTON, TX	72331	66173	6158	91.5	1820	28	2324	2042	2.82
FLEET TRANSPORT CO., CLEVELAND OH	80480	77573	2906	96.4	2556	(3054)	162	(2866)	(3.56)
GROENDYKE TRANSPORT, INC., ENID, OK	79506	76161	3345	95.8	1641	253	39	1918	2.41
KOCH SERVICE, INC., WICHITA, KS	92559	79723	12836	86.1	0	0	4857	7979	8.62
MATLACK, INC., WILMINGTON, DE	214489	212208	2281	98.9	5561	159	(1181)	(1940)	(0.90)
MILLER TRANSPORTERS, INC., JACKSON, MS	70301	71388	(1087)	101.5	1333	(196)	(930)	(1686)	(2.40)
MONTGOMERY TANK LINES, INC., PLANT CITY, FL	105518	96126	9392	91.1	4942	561	1894	3117	2.95
REFINERS TRPT. & TERMINAL, CLEVELAND, OH	72868	71431	1437	98.0	2213	(3347)	0	(4123)	(5.66)
TOTAL—TANK TRUCK	$ 995414	$ 952625	$ 42788	95.7	$25985	$(4942)	$ 7704	$ 4157	0.42%
MOTOR VEHICLES									
ALLIED SYSTEMS "LTD.," DECATUR, GA	$ 189870	$ 185630	$ 4240	97.8	$ 3099	$ 550	$ 0	$ 1691	0.89%
ANCHOR MOTOR FREIGHT, BIRMINGHAM, MI	256629	247521	9109	96.5	4182	146	4197	876	0.34
CASSENS TRANSPORT CO., EDWARDSVILLE, IL	77310	79070	(1760)	102.3	301	200	301	(2162)	(2.80)
COMMERCIAL CARRIERS, BLOOMFIELD HILLS, MI	210070	209032	1038	99.5	0	3	232	809	0.39
COMPLETE AUTO TRANSIT, BLOOMFIELD HILLS, MI	238955	230441	8514	96.4	1740	1450	3697	4527	1.89
JACK COOPER TRPT. CO., OKLAHOMA CITY, OK	88988	83862	5125	94.2	1857	(430)	1120	1718	1.93
E&L TRANSPORT COMPANY, WAYNE, MI	102200	103001	(801)	100.8	55	456	208	(608)	(0.59)
M&G CONVOY, INC., BUFFALO, NY	101095	104052	(2957)	102.9	1138	301	(1845)	(1949)	(1.93)
NU-CAR CARRIERS, INC., BIRMINGHAM, MI	133146	137443	(4297)	103.2	3815	4	(1540)	(6568)	(4.93)
TOTAL—MOTOR VEHICLE CARRIERS	$1398263	$1380052	$ 18210	98.7	$16187	$2681	$ 6370	$ (1666)	(0.12)%
REFRIGERATED COMMODITIES									
FFE TRPTN SVCS INC, DALLAS, TX	$ 107215	$ 103938	$ 3277	96.9	$ 1237	$ 926	$ 949	$ 2017	1.88%
KLLM TRANSPORT SERVICES, INC., JACKSON, MS	115745	109034	6711	94.2	4529	9	800	1391	1.20
MARTEN TRANSPORT, LTD., MONDOVI, WI	73312	72494	818	98.9	3112	375	(520)	(1399)	(1.91)
NATIONAL CARRIERS, INC., LIBERAL, KS	73020	70052	2967	95.9	1868	765	576	1288	1.76
TOTAL—REFRIGERATED COMMODITIES	$ 369292	$ 355518	$ 13773	96.3	$10746	$2075	$ 1805	$ 3297	0.89%
OTHER SPECIALIZED CARRIERS									
ANDERSON TRUCKING SVC, ST CLOUD, MN	$ 103408	$ 97649	$ 5759	94.4	$ 1116	$ 0	$1614	$ 3029	2.93%
JACK GRAY TRANSPORT, INC., GARY, IN	77789	71931	5858	92.5	497	633	(685)	6679	8.59
INDEPENDENT FREIGHTWAYS, ROCKFORD, IL	145453	140286	5167	96.4	1862	(129)	1253	1923	1.32
MERCHANTS HOME DELIVERY, OXNARD, CA	88467	80395	8071	90.9	29	(943)	3080	4019	4.54
POOLE TRUCK LINE, INC., EVERGREEN, AL	104520	104041	479	99.5	4838	(689)	(6329)	1281	1.23
TRI-STATE MOTOR TRANSIT, JOPLIN, MO	104799	103220	1578	98.5	1761	559	75	301	0.29
TOTAL—OTHER SPECIALIZED CARRIERS	$ 624436	$ 597522	$ 26913	95.7	$10103	$ (572)	$ (993)	$17231	2.76%

$ 6184	$ 64028	$ 198	$ 4464	$ 4213	$ 1061	$ 4491	$ 1714	$ 593	$ 0	NA	21384
12788	68801	18889	49397	10569	23189	10944	4654	22683	2251	6686	222361
→	21071	←	15736	7488	2697	4412	0	6248	22622	NA	74730
2741	12421	3422	12876	1996	1382	2829	1003	5788	61956	2174	107921
1191	3723	849	5499	1861	1448	2757	938	3394	64031	1455	87426
2631	10622	2275	12161	2282	2752	2856	1171	371	33626	934	65756
1270	22798	3352	24068	2121	3145	2480	1061	3684	5425	794	79409
1662	17866	2311	17080	4850	3386	2818	1334	5951	5633	756	70566
1680	656	961	1652	8832	109	3180	497	562	69420	NA	NA
17229	167399	29561	120835	14475	17847	23100	8604	48440	37	7122	495377
3952	20744	5176	20681	8745	3445	4058	1880	12308	408	1436	92783
5738	31712	6433	32697	0	4867	6067	1797	13796	28096	946	98059
3042	27407	5554	23165	5525	8738	5076	1788	11032	3858	2275	88459
3750	28995	4232	19732	7632	8267	8328	2465	11582	44179	1381	118923
2718	1524	1040	2723	1905	818	1122	710	4830	52900	1296	72719
2556	21547	4058	23594	2410	3381	5542	1112	10336	746	NA	76086
9529	31406	14831	12066	4050	1694	1938	772	2314	4037	NA	11881
4267	9239	5294	4194	19789	738	5755	1091	1812	145592	NA	202811
3897	12371	4360	17651	3627	3242	3117	1115	273	19778	1364	80953
13584	96374	36754	38908	18927	1699	7268	2779	6591	63085	2913	120245
7347	92973	38639	23793	20925	10836	7264	1014	14780	3477	NA	128125
4711	3284	986	752	6812	1000	8050	1637	2865	60002	1558	39609
10631	68882	12924	50474	6636	25952	11491	3310	28740	937	3472	251099
$123098	$835843	$202099	$534198	$166630	$131693	$134043	$42486	$218473	$692096	36562	2606682
$ 12325	$ 40079	$ 20764	$ 27976	$ 11684	$ 6228	$ 6681	$ 4581	$ 13624	$ 57900	4781	94135
4680	21759	6792	11902	5696	3877	2312	1410	6030	1715	3993	44916
3770	4657	2680	6433	7499	1031	2611	1125	2790	44977	7820	60504
3316	22961	5710	9606	3495	3463	6031	816	4282	16481	4241	56167
4888	25350	5967	26471	1144	1884	5306	1223	6665	825	NA	51280
13375	48793	19483	42638	13957	8954	7331	4797	14430	38450	7466	103094
5023	17430	7723	11372	4487	3251	2226	1374	2852	15650	2955	44553
4508	3033	2205	8397	6861	859	2704	1573	3564	62422	1988	58994
7063	18285	9152	10665	5750	1388	2415	761	3432	12520	8006	39447
$ 58948	$202347	$ 80476	$155460	$ 60613	$ 30935	$ 37617	$17660	$ 57669	$250940	41250	553089
$ 4990	$ 71553	$ 28154	$ 24594	$ 13679	$ 9388	$ 7250	$ 1382	$ 5215	$19425	2729	8588
7664	89198	40806	36795	29189	4918	13792	1732	21579	1848	2988	94108
2350	29500	11465	11234	2781	4831	3807	562	3855	8685	1232	39299
7245	71604	32679	30118	8747	10823	9906	1199	14122	22589	3887	90952
7573	70647	33201	32368	7778	10629	8075	1753	23004	35413	2569	102382
4644	33610	13299	16223	2927	4695	3129	771	4481	83	1297	40102
5823	30179	14194	13734	6832	4717	3512	1158	1976	20876	1139	35604
4118	32598	17772	14783	3815	4270	4872	748	10370	10706	1241	36733
4768	47125	20508	16667	16888	2716	8591	883	10378	8919	2769	59108
$ 49175	$476014	$212078	$196516	$ 92636	$ 56987	$ 62934	$ 10188	$ 94980	$128544	19851	584176
$ 6259	$ 3195	$ 2888	$ 6163	$ 4855	$ 932	$ 4211	$ 1896	$ 1280	$ 72259	1070	62032
4861	29863	4735	42538	3722	2210	5938	2439	12728	0	1701	109310
3049	18787	5231	19021	3034	3331	4965	1093	9584	4399	785	74484
1927	1511	1428	2385	3278	570	2213	363	1540	54837	207	69547
$ 16096	$ 53356	$ 14282	$ 70107	$ 14889	$ 7043	$ 17327	$ 5791	$ 25132	$131495	3763	315373
$ 15686	$ 569	$ 3303	$ 15717	$ 5848	$ 3141	$ 2942	$ 1620	$ 4634	$ 44189	998	76984
2838	3976	2206	3240	3367	1238	3228	610	1182	55046	4834	49102
→	5421	1038	1600	13017	6	6154	1281	1300	110469	2147	122240
6544	3366	2188	476	7484	111	6563	540	1041	52082	NA	NA
4806	33549	8036	22358	4352	10548	5664	1878	5383	7467	2319	144680
6075	21909	6622	13488	5450	6918	3690	1922	2649	34497	816	83408
$ 35949	$ 68790	$ 23393	$ 56879	$ 39518	$ 21962	$ 28241	$ 7851	$ 16189	$298750	11114	446414

(all dollar amounts in thousands)

HOUSEHOLD GOODS									
ALLIED VAN LINES, INC., NAPERVILLE, IL	$ 405968	$ 395806	$ 10162	97.5	$ 7051	$ 8275	$ 5340	$ 6046	1.49%
ATLAS VAN LINES, INC., EVANSVILLE, IN	208318	194299	14018	93.3	11202	(103)	1452	1261	0.61
BEKINS VAN LINES CO., HILLSIDE, IL	210892	206217	4676	97.8	385	643	1972	2962	1.40
BURNHAM SERVICE CO., INC., COLUMBUS, GA	93326	88238	5088	94.5	0	146	1988	3246	3.48
GRAEBEL VAN LINES, INC., WAUSAU, WI	84132	83604	528	99.4	133	174	54	515	0.61
MAYFLOWER TRANSIT, INC., INDIANAPOLIS, IN	320772	312588	8185	97.4	362	9075	5716	11182	3.49
NORTH AMERICAN VAN LINES, INC., FT. WAYNE, IN	792190	791845	345	100.0	11545	2273	(2982)	(5945)	(0.75)
UNITED VAN LINES, INC., FENTON, MO	468023	464083	3940	99.2	3537	2465	983	1885	0.40
TOTAL - HOUSEHOLD GOODS	$2583621	$2536680	$46942	98.2	$34215	$22948	$14523	$21152	0.92%

Definitions and Explanations Of Financial Terminology Used On The Charts

Operating Ratio: Operating expenses as a percentage of gross revenues. Since it excludes extraordinary expenses, income taxes and interest, individual peculiarities are eliminated so the ratio may be used as an industry-wide measure of performance.

Other Fringes: Includes charges such as federal and state payroll taxes, group and workers' compensation insurance, pension and retirement plans through both commercial insurance and unions.

Maintenance/Operating Supplies and Expenses: Includes fuel, oil, lubricants and coolants, vehicle parts, vehicle maintenance by outside vendors, tires and tubes, and miscellaneous supplies such as hand tools, brake fluid and antifreeze.

General Supplies and Expenses: Includes costs of administrative supplies including computer software, books, magazines, magnetic tapes, postage, stationery, printing of tariffs, advertising, commission agent fees, solicitation commissions, company personnel's T&E expenses. Also building and equipment rents and miscellaneous expenses such as fees for professional services by physicians, attorneys, etc., plus uncollectable revenues.

Operating Taxes and Licenses: Includes fuel and oil taxes, vehicle license and registration fees based on usage, real estate and personal property taxes, and tax items such as capital stock taxes, gross receipts taxes, occupancy taxes, etc.

Depreciation and Amortization & Gain or Loss on Disposition of Operating Assets: Includes depreciation of structures on owned land, revenue and shop equipment, furniture and office equipment; amortization of: improvements to leasehold property, fixed term motor carrier franchises, permits, licenses, patent rights, etc.; gain or loss on disposition of operating assets such as sold, traded or retired tractors, trailers and trucks.

Revenue Equipment Rents and Purchased Transportation: Includes amounts payable for: furnishing vehicles with or without the services of drivers, transportation of shipments in another carrier's vehicle including intermodal fleets, and allowance to shippers for picking up or delivering freight to a carrier's facility.

First, the comparatively good news: the nation's Top 100 for-hire carriers' total revenues increased 5.9% over 1988.

Believers in the power of positive thinking, might think the 5.9% revenue growth figure isn't too shabby, considering that the U.S. Gross National Product (GNP) increased by only 2.6% in the same period, and the Producer Price Index (PPI) went up 5.1%.

Now, the bad news: the leading U.S. common carriers' total operating expenses increased at an even faster rate—7.8%. And as a result, the biggest for-hire fleets' composite post-tax income declined 27.6% last year, compared to 1988.

Obviously, the cost of diesel fuel, which skyrocketed in late 1989 and ballooned by 15.8% overall last year, was a major reason for the weak profit picture.

To compound the fuel-cost problem, 18 states and the District of Columbia increased fuel taxes last year. That's the most widespread increase since 1981, when 21 states raised fuel taxes.

Surging medical and workers compensation insurance expenses also made deep cuts into profits.

Perhaps the best measurement of how the Top 100 coped with a slowing economy and out-of-whack fuel costs was the fact that the composite operating ratio (OR) increased from 96.5 in 1988 to 96.7 last year.

There were bright spots in 1989, too. Werner Enterprises, for example, had a banner year. Gross revenues increased by $60.1 million. That's 31.4% growth, up from

Text continues on page 66

THE HIGH FIVES

Carriers with highest net incomes ($ million)

United Parcel Service (Oh.)	$277.9
Consolidated Freightways	57.9
Roadway Express	57.3
Overnite Transportation	47.6
Yellow Freight	42.9

Carriers with highest profit margins

New Penn Motor Express	15.7%
Roadrunner Trucking	14.0%
Transus	12.7%
Koch Service	8.6%
MS Carriers	8.6%

THE FALTERING FIVES

Carriers with worst losses ($ million)

Brown Transport	$22.2
ANR Freight System	17.6
Countrywide Truck Service	11.4
ABF Freight System	10.3
Missouri Nebraska Express	7.4

Carriers with worst losses (by percentage)

Countrywide Truck Service	-16.0%
Brown Transport	-11.7%
P.A.M. Transportation Svcs	-9.8%
Missouri Nebraska Express	-5.6%
Refiners Transport & Terminal	-5.7%

Profit Comparison by Type Fleet Average

	1989 OR	1988 OR	1989 Profit Margin	1988 Profit Margin
Less-than-truckload	95.5	94.9	2.67%	3.66%
Truckload	95.2	94.2	1.64%	1.70%
Tank Truck	95.7	95.5	0.42%	1.11%
Car Carriers	98.7	96.3	-0.12%	2.21%
Reefers	96.3	94.9	0.89%	2.27%
Household Goods	98.2	97.5	0.82%	0.83%

Perhaps the best measurement of how the Top 100 coped with a slowing economy and out-of-whack fuel costs was the fact that the composite operating ratio (OR) increased from 96.5 in 1988 to 96.7 last year.

TOP 100

(all dollar amounts in thousands)

1	UNITED PARCEL SERVICE (OHIO), GREENWICH, CT	CMGF	$7249363	$6608037	1	94.1	31	93.6	33
2	UNITED PARCEL SERVICE (NEW YORK), GREENWICH, CT	CMGF	2803091	2526709	2	98.5	T72	99.9	87
3	YELLOW FREIGHT SYSTEM, INC., OVERLAND PARK, KS	CMGF	2189638	1991602	3	98.3	71	94.5	42
4	CONSOLIDATED FREIGHTWAYS CORP (DEL), PORTLAND, OR	CMGF	1894950	1749180	4	95.0	T38	93.9	35
5	ROADWAY EXPRESS, INC., AKRON, OH	CMGF	1835496	1693597	5	95.4	44	94.1	39
6	NORTH AMERICAN VAN LINES, INC., FORT WAYNE, IN*	CMHG	792190	817895	6	100.0	86	97.3	67
7	OVERNITE TRANSPORTATION COMPANY, RICHMOND, VA	CMGF	697783	638486	7	91.0	18	87.1	9
8	SCHNEIDER NATIONAL, INC., GREEN BAY, WI	CMGF	665817	523748	NR	NA	NR	NA	NR
9	ABF FREIGHT SYSTEM, INC., FORT SMITH, AR	CMGF	630144	616774	8	96.9	T54	95.8	50
10	CAROLINA FREIGHT CARRIERS CORP, CHERRYVILLE, NC	CMGF	538889	531557	9	98.6	T74	95.2	45
11	J.B. HUNT TRANSPORT, INC., LOWELL, AR	CMGF	509278	392553	13	87.9	10	84.8	5
12	UNITED VAN LINES, INC., FENTON, MO	CMHG	468023	440284	12	99.2	79	100.0	88
13	ANR FREIGHT SYSTEM, INC., DENVER, CO	CMGF	416348	468009	11	105.3	96	101.5	92
14	ALLIED VAN LINES, INC., NAPERVILLE, IL	CMHG	405968	383626	14	97.5	64	98.3	75
15	CON-WAY TRANSPORTATION SERVICES, PORTLAND, OR	CMGF	383418	NA	NR	85.8	5	NA	NR
16	PRESTON TRUCKING COMPANY, INC., PRESTON, MD	CMGF	366938	368044	15	98.8	76	97.1	63
17	MAYFLOWER TRANSIT, INC., INDIANAPOLIS, IN	CMHG	320772	314226	16	97.4	T62	97.2	66
18	ST. JOHNSBURY TRUCKING CO., INC., HOLLISTON, MA	CMGF	313552	296900	19	91.1	T19	90.5	15
19	RYDER DISTRIBUTION RESOURCES, INC., MIAMI, FL	CMGF	281502	251755	22	101.6	90	98.0	74
20	CENTRAL TRANSPORT, INC., STERLING HEIGHTS, MI	CMGF	278816	309642	17	99.7	84	96.7	56
21	ANCHOR MOTOR FREIGHT, INC., BIRMINGHAM, MI	CTMV	256629	272209	20	96.5	53	96.7	56
22	WERNER ENTERPRISES, INC., OMAHA, NE	CMGF	251575	191438	35	87.4	8	85.3	6
23	COMPLETE AUTO TRANSIT, INC., BLOOMFIELD HILLS, MI	CTMV	238955	247180	24	96.4	T49	93.9	35
24	SIGNAL DELIVERY SERVICE, INC., CLEVELAND, OH	CMSC	230995	248725	23	95.7	46	95.8	50
25	BUILDERS TRANSPORT, INC., CAMDEN, SC	CMGF	228229	203861	31	98.2	70	96.0	53
26	VIKING FREIGHT SYSTEM, INC., SAN JOSE, CA	CMGF	226074	205147	30	90.9	T15	92.8	27
27	JONES TRUCK LINES, INC., SPRINGDALE, AR	CMGF	218093	193008	NR	96.9	T54	97.5	NR
28	MATLACK, INC., WILMINGTON, DE	CTLP	214489	227694	25	98.9	T77	97.0	61
29	CENTRAL FREIGHT LINES, INC., WACO, TX	CMGF	213259	211418	28	94.6	37	90.9	16
30	BEKINS VAN LINES COMPANY, HILLSIDE, IL	CMHG	210892	212650	27	97.8	T65	98.9	81
31	COMMERCIAL CARRIERS, INC., BLOOMFIELD HILLS, MI	CMMV	210070	198043	34	99.5	T81	92.8	27
32	ATLAS VAN LINES, INC., EVANSVILLE, IN	CMHG	208318	201007	32	93.3	27	94.1	39
33	CHEMICAL LEAMAN TANK LINES, INC., EXTON, PA	CTLP	207362	214424	26	97.3	T59	97.1	63
34	TNT HOLLAND MOTOR EXPRESS, INC., HOLLAND, MI	CMGF	206241	181953	36	89.6	13	89.6	13
35	WATKINS MOTOR LINES, INC., LAKELAND, FL	CMGF	203677	171647	38	95.1	T40	95.7	49
36	RANGER TRANSPORTATION, INC., JACKSONVILLE, FL	CMGF	203245	209926	29	97.3	T59	98.6	79
37	BROWN TRANSPORT CORP, CHARLOTTE, NC	CMGF	190193	245397	NR	104.8	95	108.3	NR
38	ALLIED SYSTEMS "LTD," DECATUR, GA	CMMV	189870	200822	33	97.8	T65	96.9	55
39	NORTHWEST TRANSPORT SERVICE, COMMERCE CITY, CO	CMGF	181519	172333	37	93.7	28	92.0	25
40	TNT RED STAR EXPRESS, INC., AUBURN, NY	CMGF	146035	127420	43	95.0	T38	96.1	54
41	INDEPENDENT FREIGHTWAYS, INC., ROCKFORD, IL	CMSC	145453	130802	41	96.4	T49	98.7	80
42	CHURCHILL TRUCK LINES, INC., CHILLICOTHE, MO	CMGF	145009	139548	40	97.8	T65	95.5	48
43	NATIONAL FREIGHT, INC., VINELAND, NJ	CMGF	144405	133195	NR	96.4	T49	105.1	NR
44	AAA COOPER TRANSPORTATION, DOTHAN, AL	CMGF	136375	116472	45	90.1	14	87.9	11
45	A-P-A TRANSPORT CORP, NORTH BERGEN, NJ	CMGF	133347	129151	42	92.8	25	93.5	31
46	NU-CAR CARRIERS, INC., BIRMINGHAM, MI	CTMV	133146	145847	39	103.2	94	101.6	94
47	SOUTHEASTERN FREIGHT LINES, INC., COLUMBIA, SC	CMGF	129389	119984	44	91.8	22	92.3	26
48	OLD DOMINION FREIGHT LINE, INC., HIGH POINT, NC	CMGF	127690	114786	46	95.1	T40	95.4	46
49	MISSOURI NEBRASKA EXPRESS (MNX), ST. JOSEPH, MO	CMGF	123586	85230	68	106.2	97	95.4	46
50	KLLM TRANSPORT SERVICES, INC., JACKSON, MS	CMRC	115745	97410	52	94.2	T32	91.4	22

For Top 100 listings under "Type": BM-building materials, CM-common; CT-contracts; GF-general freight; ED-explosives/dangerous articles; FP-forest products; HG-household goods; HM-heavy machinery; LP-liquid petroleum products (included, in most cases, other bulk commodities); MV-motor vehicles; RS-retail store delivery; SC-specific commodity not otherwise grouped.
T: Tie in Operating Ratio. NR: Not Ranked

(all dollar amounts in thousands)

51	NEW PENN MOTOR EXPRESS, INC., LEBANON, PA	CMGF	$113274	$109550	47	80.0	1	81.6	2
52	AVERITT EXPRESS, INC., COOKEVILLE, TN	CMGF	113097	87229	66	92.9	26	91.3	20
53	CRETE CARRIER CORPORATION, LINCOLN, NE	CMGF	111757	95939	54	95.2	43	95.1	44
54	CONTRACT FREIGHTERS, INC., JOPLIN, MO*	CMGF	110106	99207	51	89.5	12	85.5	7
55	FFE TRANSPORTATION SERVICES, INC., DALLAS, TX	CMRC	107215	88699	62	96.9	T54	95.0	43
56	MONTGOMERY TANK LINES, INC., PLANT CITY, FL	CMLP	105518	92749	NR	91.1	T19	91.4	NR
57	TRI-STATE MOTOR TRANSIT CO., JOPLIN, MO	CMSC	104799	93721	56	98.5	T72	100.5	89
58	POOLE TRUCK LINE, INC., EVERGREEN, AL	CMHM	104520	103000	NR	99.5	T81	NA	NR
59	ANDERSON TRUCKING SERVICE, INC., ST. CLOUD, MN	CMSC	103408	83822	72	94.4	T34	94.2	41
60	ADVANCE TRANSPORTATION COMPANY, MILWAUKEE, WI	CMGF	102989	94977	55	97.3	T59	97.1	63
61	E&L TRANSPORT COMPANY (MI CORP), WAYNE, MI	CTMV	102200	104757	49	100.8	87	96.9	58
62	M&G CONVOY, INC., BUFFALO, NY	CMMV	101095	107455	48	102.9	93	98.3	75
63	MERCHANTS FAST MOTOR LINES, INC., ABILENE, TX	CMGF	99785	88593	63	98.6	T74	99.4	84
64	MUNSON TRANSPORTATION, INC., MONMOUTH, IL	CMGF	99645	82933	73	95.5	45	91.1	19
65	ARKANSAS FREIGHTWAYS CORP., HARRISON, AR	CMGF	97593	73080	87	92.0	23	91.3	20
66	M.S. CARRIERS, INC., MEMPHIS, TN	CMGF	96813	68480	99	84.1	3	84.4	3
67	BURNHAM SERVICE COMPANY, INC., COLUMBUS, GA	CMHG	93326	96144	53	94.5	36	91.0	17
68	KOCH SERVICE, INC., WICHITA, KS	CMLP	92559	91956	57	86.1	6	80.6	1
69	HYMAN FREIGHTWAYS, INC., MOUNDS VIEW, MN	CMGF	91144	84864	71	98.0	T68	99.5	85
70	DART TRANSIT COMPANY, ST. PAUL, MN	CMGF	90771	85141	69	94.4	T34	93.5	31
71	GEMINI TRANSPORTATION SERVICES, GREENSBURG, PA	CMGF	90163	89043	59	97.1	T57	97.3	67
72	ESTES EXPRESS LINES, RICHMOND, VA	CMGF	89937	88446	64	87.5	9	84.4	3
73	ACE TRANSPORTATION, INC., LAFAYETTE, LA	CMSC	89271	64532	NR	97.4	T62	95.3	NR
74	JACK COOPER TRANSPORT COMPANY, OKLAHOMA CITY, OK	CMMV	88988	90788	58	94.2	T32	97.6	71
75	MERCHANTS HOME DELIVERY SERVICE, INC., OXNARD, CA	CMSC	88467	78137	76	90.9	T15	91.9	24
76	UNIVERSAL AM-CAN, LTD., STERLING HEIGHTS, MI	CMGF	87874	78614	75	102.5	92	93.2	30
77	SAIA MOTOR FREIGHT LINE, INC., HOUMA, LA	CMGF	85617	73441	85	86.2	7	87.2	10
78	G.I. TRUCKING COMPANY, LA MIRADA, CA	CMGF	84258	75001	82	97.1	T57	103.5	97
79	GRAEBEL VAN LINES, INC., WAUSAU, WI	CMHG	84132	66870	NR	99.4	80	99.5	NR
80	DALLAS & MAVIS FORWARDING CO., KENOSHA, WI*	CMMV	82846	85350	67	95.1	T40	93.7	34
81	PENNSYLVANIA TRUCK LINES, INC., WYNNEWOOD, PA	CMGF	82766	88920	60	99.8	85	97.7	72
82	ROADRUNNER TRUCKING, INC., ALBUQUERQUE, NM	CMGF	81058	74270	83	85.7	4	91.0	17
83	FLEET TRANSPORT CO., INC., CLEVELAND, OH	CMLP	80480	72683	88	96.4	T49	101.5	92
84	GROENDYKE TRANSPORT, INC., ENID, OK	CMLP	79506	76357	79	95.8	47	93.9	35
85	WILLIG FREIGHT LINES, SAN FRANCISCO, CA	CMGF	79212	75572	81	93.8	29	92.9	29
86	NEW PRIME, INC., SPRINGFIELD, MO	CMGF	78599	61186	NR	89.4	11	89.7	NR
87	JACK GRAY TRANSPORT, INC., GARY, IN	CMSC	77789	76447	78	92.5	24	90.2	14
88	CASSENS TRANSPORT COMPANY, EDWARDSVILLE, IL	CMMV	77310	81129	74	102.3	91	95.8	50
89	WHITEFORD TRANSPORT SYSTEMS, SOUTH BEND, IN	CMGF	73927	124247	NR	80.7	2	91.6	NR
90	C.R. ENGLAND & SONS, SALT LAKE CITY, UT	CMGF	73881	59286	NR	93.9	30	90.2	NR
91	MARTEN TRANSPORT, LTD., MONDOVI, WI	CMRC	73312	67173	NR	98.9	T77	94.2	NR
92	NATIONAL CARRIERS, INC., LIBERAL, KS	CMRC	73020	68118	100	95.9	48	96.9	58
93	REFINERS TRANSPORT & TERMINAL CORP, CLEVELAND, OH	CMLP	72868	69039	94	98.0	T68	103.4	96
94	DSI TRANSPORTS, INC., HOUSTON, TX	CMLP	72331	69627	92	91.5	21	91.4	22
95	COUNTRY WIDE TRUCK SERVICE, INC., POMONA, CA	CMGF	71077	87834	65	112.9	99	99.5	85
96	TRANSUS, INC., ATLANTA, GA	CMGF	70536	68787	95	99.5	T81	99.1	82
97	MILLER TRANSPORTERS, INC., JACKSON, MS	CMLP	70301	74048	84	101.5	89	96.9	58
98	P.A.M. TRANSPORTATION SERVICES, TONTITOWN, AR	CMGF	70122	75796	80	107.4	98	97.3	67
99	DONCO CARRIERS, INC., OKLAHOMA CITY, OK	CMGF	69774	60447	NR	101.4	88	95.9	NR
100	FREYMILLER TRUCKING, INC., BAKERSFIELD, CA	CMGF	69151	58736	NR	90.9	T15	93.9	NR

	Gross Revenue	Expenses	Post Tax Net Income
TOTAL TOP 100-1989	$32,356,211	$30,983,015*	$730,865*
TOTAL TOP 100-1988	$30,540,353	$29,041,440	$937,809
TOTAL TOP 100-1987	$28,155,417	$27,157,323	$480,580

Expense and income figures don't include Schneider National, which has been exempted from reporting financial data to the ICC.

TOP 100

(all dollar amounts in thousands)

101	MIDWEST COAST TRANSPORT, INC., SIOUX FALLS, SD	CMRC	$68003	$69174	95.8	97.5
102	CON-WAY EASTERN EXPRESS,INC., PORTLAND, OR	CMGF	67734	51794	110.2	110.4
103	JONES TRANSFER COMPANY, MONROE, MI	CMGF	65748	71996	97.3	103.3
104	MONFORT TRANSPORTATION CO., GREELEY, CO	CMGF	64276	55749	98.3	92.8
105	MALONE FREIGHT LINES, INC., BIRMINGHAM, AL	CMGF	63670	52767	98.7	98.7
106	B.I. TRANSPORTATION, INC., BURLINGTON, NC	CTGF	62860	NA	94.9	NA
107	MORGAN DRIVE AWAY, INC., ELKHART, IN	CMSC	62484	59779	97.5	96.7
108	JONES MOTOR COMPANY, SPRING CITY, PA	CMGF	62154	68554	99.3	98.4
109	LYONS TRANSPORTATION LINES, INC., ERIE, PA	CMGF	61446	72537	111.1	100.8
110	ECK MILLER TRPTN CORP., ROCKPORT, IN	CMGF	61224	NA	100.2	NA
111	McGIL SPECIALIZED CARRIERS, MARIETTA, GA	CMSC	60799	57970	98.2	98.2
112	MAY TRUCKING COMPANY, PAYETTE, ID	CMGF	60774	46261	100.1	98.2
113	FORE WAY EXPRESS, INC., WAUSAU, WI	CMGF	60774	55776	98.1	98.1
114	GLOBAL VAN LINES, INC., ORANGE, CA	CMHG	60755	58605	98.1	98.4
115	PRE-FAB TRANSIT CO., FARMER CITY, IL	CMGF	59800	72181	97.5	97.0
116	PST, INC., LINDON, UT	CMSC	58637	59296	95.3	92.7
117	JANESVILLE AUTO TRANSPORT, BLOOMFIELD HILLS, MI	CTMV	57664	61834	95.6	94.3
118	WILSON TRUCKING CORP., FISHERSVILLE, VA	CMGF	57656	58807	92.8	89.8
119	WILLIS SHAW FROZEN EXPRESS, ELM SPRINGS, AR	CMRC	57088	51984	89.6	90.1
120	SOUTHWESTERN MOTOR TRANSPORT, SAN ANTONIO, TX	CMGF	56972	54723	97.6	95.1
121	CROUSE CARTAGE COMPANY, CARROLL, IA	CMGF	55125	48965	95.3	96.4
122	PIONEER TRANSPORTATION SYSTEMS, HURLOCK, MD	CMGF	55117	47874	101.1	96.3
123	PAUL ARPIN VAN LINES, EAST GREENWICH, RI	CMHG	54751	34253	98.2	96.6
124	DEATON, INC., BIRMINGHAM, AL	CMSC	54369	57365	102.2	96.3
125	JACK B. KELLEY, INC., AMARILLO, TX	CMSC	54275	45376	100.3	99.4
126	ALTERMAN TRANSPORT LINES, OPA LOCKA, FL	CMRC	54274	54508	99.2	99.7
127	TNT BESTWAY TRANSPORTATION, PHOENIX, AZ*	CMGF	54251	48508	90.0	92.6
128	WILEY SANDERS TRUCK LINES, INC., TROY, AL	CMGF	53720	48462	83.0	89.5
128	HADLEY AUTO TRANSPORT, SANTA ANA, CA	CTMV	53131	50001	94.6	91.5
130	McKENSIE TANK LINES, INC., TALLAHASSEE, FL	CMLP	51861	49349	94.2	94.1
131	TLC LINES, INC., FENTON, MO	CMGF	51615	40800	96.7	96.3
132	COMMERCIAL CARRIERS CORP., AUBURNDALE, FL*	CMGF	51512	48292	85.2	89.2
133	BE-MAC TRANSPORT CO., INC., ST. LOUIS, MO	CMGF	51224	36782	99.1	95.5
134	CENTRAL TRANSPORT, INC., HIGH POINT, NC	CMLP	51089	52465	93.6	93.2
135	ROEHL TRANSPORT, INC., MARSHFIELD, WI	CMGF	50986	44707	88.3	86.1
136	NEW ENGLAND MOTOR FREIGHT, INC., ELIZABETH, NJ	CMGF	49758	42859	96.4	96.4
137	SMALLEY TRANSPORTATION COMPANY, TAMPA, FL	CMGF	49739	45044	101.7	96.7
138	SOUTHWEST MOTOR FREIGHT, CHATTANOOGA, TN	CMGF	49043	37203	101.1	103.0
139	LYNDEN TRANSPORT, INC., KENT, WA	CMGF	48371	39376	91.1	99.6
140	HEARTLAND EXPRESS INC. OF IOWA, CORALVILLE, IA	CMGF	48300	34571	97.5	94.7
141	DAILY EXPRESS, INC., CARLISLE, PA	CMSC	48073	48117	95.6	93.3
142	ARMELLINI EXPRESS LINES, INC., PALM CITY, FL	CMSC	47725	42024	96.7	98.5
143	INTERMODAL TRPTN. SERVICE, INC., CINCINNATI, OH*	CMGF	47370	59014	98.7	99.8
144	STANDARD TRUCKING COMPANY, CHARLOTTE, NC	CMGF	47208	41744	98.1	96.2
145	WHEATON VAN LINES, INC., INDIANAPOLIS, IN	CMHG	46208	47651	97.0	94.4
146	GORDON TRUCKING, INC., SUMNER, WA	CMGF	46024	44272	98.0	95.0
147	CONTRACT TRANSPORTATION SYSTEMS, CLEVELAND, OH	CMGF	45620	46748	88.7	94.6
148	ACME TRUCK LINE, INC., HARVEY, LA	CMGF	45292	37497	97.4	95.8
149	GLENN McCLENDON TRUCKING CO., LAFAYETTE, AL	CMGF	45171	41009	93.3	101.5
150	PBX, INC., DAKOTA CITY, NE	CMRC	45100	38704	90.3	86.4

Con-Way Transportation Services statistics combine data for Con-way Central Express, Con-Way Southern Express, Con-Way Southwestern Express and Con-Way Western Express. Con-Way Eastern Express, ranked 102, is reported separately.

Montgomery Tank Lines absorbed Quality Carriers in 1989. In 1988, Montgomery had revenues of $58.2 million and an 87.0 OR. Quality Carriers' 1988 revenues were $37.6 million, with an 96.7 OR.

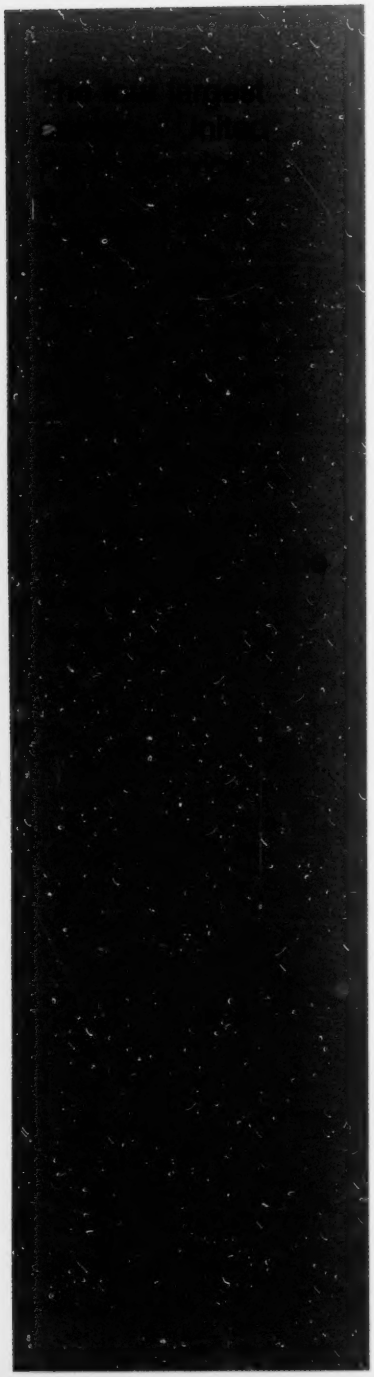
Whiteford Transportation's revenues declined in 1989 due to the sale of Whiteford National Lease.

Brown Transport and Malone Freight Lines have been involved in bankruptcy proceedings.

(all dollar amounts in thousands)

151	D.M. BOWMAN, INC., WILLIAMSPORT, MD	CMSC	44841	32981	96.2	96.7
152	RYDER TEMP. CONTROLLED CARRIAGE, NASHVILLE, TN	CMRC	$44383	$57181	114.4	108.0
153	MOTOR CARGO, N. SALT LAKE CITY, UT	CMGF	43494	39328	91.2	87.9
154	KENAN TRANSPORT COMPANY, CHAPEL HILL, NC	CMLP	43363	44822	92.1	90.1
155	BULKMATIC TRANSPORT COMPANY, CHICAGO, IL	CMSC	43350	39002	95.4	93.2
156	SHAFFER TRUCKING, INC., NEW KINGSTOWN, PA	CMRC	42877	46286	95.9	92.7
157	FREDRICKSON MOTOR EXPRESS, CHARLOTTE, NC	CMGF	42749	41404	98.6	100.2
158	COLONIAL FREIGHT SYSTEMS, KNOXVILLE, TN	CMRC	42566	49794	98.3	96.3
159	THE O.K. TRUCKING COMPANY, CINCINNATI, OH	CMGF	42532	47075	98.9	97.6
160	INDUSTRIAL FREIGHT SYSTEM, SUN VALLEY, CA	CMGF	42435	37290	97.9	99.7
161	THE MICKOW CORPORATION, DES MOINES, IA	CMSC	42247	39274	98.0	98.7
162	DI SALVO TRUCKING CO., SAN FRANCISCO, CA*	CMGF	41845	42779	103.4	101.7
163	MIDDLEWEST FREIGHTWAYS, INC., ST. LOUIS, MO	CMGF	41761	41795	100.7	97.6
164	MELTON TRUCK LINES, INC., SHREVEPORT, LA	CMSC	41640	45182	101.9	99.3
165	NORTH PENN TRANSFER, INC., LANSDALE, PA	CMGF	41134	39474	103.5	98.9
166	SMITHWAY MOTOR XPRESS, INC., FORT DODGE, IA	CMGF	41078	34809	97.6	95.0
167	WARD TRUCKING CORP., ALTOONA, PA	CMGF	40675	40992	104.7	99.9
168	PLOOF TRUCK LINES, INC., JACKSONVILLE, FL	CMGF	40409	38562	84.1	84.7
169	GREAT COASTAL EXPRESS, RICHMOND, VA	CMGF	39926	36812	90.6	85.6
170	LEASEWAY MOTORCAR TRANSPORT, BIRMINGHAM, MI	CMVV	39855	48092	104.8	105.7
171	KEYSTONE LINES, ANAHEIM, CA	CMGF	39626	45965	97.2	95.8
172	GEORGE TRANSFER, INC., PARKTON, MD	CMGF	38882	40200	98.2	96.6
173	THE MANFREDI MOTOR TRANSIT CO., NEWBURY, OH	CMSC	38858	38398	96.7	93.3
174	IVORY, INC., CINCINNATI, OH*	CMGF	38809	NA	96.8	NA
175	SCHWERMAN TRUCKING CO., MILWAUKEE, WI	CMSC	38391	38084	96.9	96.9
176	SCHANNO TRANSPORTATION, WEST ST. PAUL, MN	CMRC	38259	39790	99.5	95.9
177	U.S. XPRESS, INC., CHATTANOOGA, TN	CMGF	38074	28093	89.7	NA
178	GROSS COMMON CARRIER, WISCONSIN RAPIDS, WI	CMGF	37976	36160	101.4	99.7
179	CONVOY COMPANY, BLOOMFIELD HILLS, MI	CTMV	37892	68636	102.4	99.3
180	THE MASON & DIXON LINES, INC., STERLING HTS, MI	CMGF	37472	37610	100.5	96.9
181	PACIFIC MOTOR TRANSPORT, SAN FRANCISCO, CA	CMGF	37355	38811	93.6	94.1
182	B&W CARTAGE CO., INC., TAYLOR, MI	CMGF	37351	31814	98.1	98.9
183	HAROLD IVES TRUCKING CO., STUTTGART, AR	CMGF	37235	NA	98.7	NA
184	HOLMES FREIGHT LINES, INC., OMAHA, NE	CMGF	36633	33953	93.3	91.8
185	NEW WORLD VAN LINES, INC., CHICAGO, IL	CMHG	36615	28409	95.5	96.3
186	ARROW TRUCKING CO., INC., TULSA, OK	CMGF	36551	32785	96.0	97.1
187	UMTHUN TRUCKING COMPANY, EAGLE GROVE, IA	CMGF	36532	35716	95.5	94.9
188	LENERTZ, INC., SOUTH ST. PAUL, MN	CMGF	35902	41078	101.6	98.0
189	A.J. METLER HAULING & RIGGING, KNOXVILLE, TN	CMSC	35883	35144	98.5	98.3
190	TNT REDDAWAY TRUCK LINE, INC., CLACKAMAS, OR	CMGF	35771	26664	84.9	85.1
191	ENTERPRISE TRANSPORTATION CO., HOUSTON, TX	CMLP	35324	34340	98.8	93.8
192	TRANSPORT SERVICE CO., HINSDALE, IL	CMLP	34870	31617	91.1	91.8
193	MIDWESTERN DISTRIBUTION, FORT SMITH, KS*	CMGF	34846	56305	118.4	106.3
194	REDWING CARRIERS, INC., TAMPA, FL	CMLP	34819	33431	95.2	95.0
195	SAMMONS TRUCKING, MISSOULA, MT	CMBM	34439	30026	98.4	100.1
196	BLUE RIDGE TRANSFER CO., INC., ROANOKE, VA	CMGF	33843	34527	102.5	98.7
197	KEY WAY TRANSPORT, INC., BALTIMORE, MD*	CMGF	33344	32310	98.0	95.7
198	CRESCENT TRUCK LINES, INC., UNION CITY, CA	CMGF	33304	28846	93.1	90.9
199	SCHEDULED TRUCKWAYS, INC., ROGERS, AR*	CMGF	33128	30322	100.9	99.9
200	NATIONAL VAN LINES, INC., BROADVIEW, IL	CMHG	33125	23511	100.9	99.2

Several carriers aren't in the Top 100 listing because they failed to file reports on a timely basis with the ICC or any of the states requiring financial and operating reports. Notably missing is P-I-E Nationwide/Transcon Lines, which is involved in new ownership and merger activities, and lately, the bankruptcy of Transcon Lines. Other significant missing carriers include: Roberts Express, Spartan Express and Roadway Package System, all part of the Roadway family. Additional potential Top 100 fleets are: RTC Transportation/Altruck Freight System, Carretta Trucking, Paul's Trucking Corp., Swift Transportation and Kenosha Auto Transport.



$191.4 million in 1988 to $251.6 million last year.

As a result, the Omaha-based truckload carrier surged from the 35th largest for-hire fleet in the U.S. to the number 22 ranking on CCJ's 22nd annual Top 100 list.

But impressive growth is almost "a given" at Werner. Since 1984, revenues grew at a compound annual rate of 36%, and net income increased, on average, more than 30%.

Werner's operating expenses grew a little faster than revenues last year, but its eighth-best 87.4 OR for 1989—up from 85.3 the previous year—is nothing to sneer at.

How did Werner capture all the new freight that generated the increased revenues and filled the additional 550 trucks—expanding the fleet's size to 2,350 units—purchased in FY 1989? Nothing unique claims Jacob Wood, Werner's executive vice president. Instead, Wood attributes Werner's significant growth to "implementing a good marketing plan and providing good service."

New Penn regains best OR title

New Penn Motor Express, the regional, less-than-truckload operation headquartered in Lebanon, Pa., recaptured the best OR pennant last year. After New Penn posted the Top 100's best ORs in 1986 and 1987, Koch Service, Wichita, Kans., won the OR race in 1988. New Penn is numero uno again—with an 80.0 OR for 1989—because its revenues were up 3.4% while its expenses increased by only 1.4%.

Consolidation continues

The four largest carriers—United Parcel Service (UPS), Yellow Freight, Consolidated Freightways and Roadway Express—continued to gain market share as a group last year. Their combined 1989 revenues totaled 49.4% of the total 100 fleets' revenues.

When CCJ published its first listing of the major revenue producers in 1968, those four fleets garnered 19.5% of the Top 100 carriers' total revenues.

And each of their 1989 revenue growth rates were significantly higher than the Top 100's 5.8% average: UPS (combination of both corporate entities), up 10.0% to $10.1 billion; Yellow Freight, up 9.9% to $2.2 billion; Consolidated Freightways, up 8.3% to $1.9 billion; Roadway Express, up 8.4% to $1.8 billion. □

Top 100 and Trends & Statistics are available in a booklet for $5. For a copy or copies of the booklet, write on company letterhead to: Reprint Editor, Commercial Carrier Journal, Chilton Way, Radnor, Pa. 19089. Send prepaid check or money order.

Where the Top 100 data come from

Transportation Technical Services, Fredericksburg, Va., compiled the Top 100 data exclusively for CCJ, based on information filed with the Interstate Commerce Commission by Class I and II carriers. Transportation Technical Services is a wholly owned affiliate of the Central Analysis Bureau of New York City.

Carriers' reporting and deadline requirements have been changed by the ICC. So some detailed information on equipment and maintenance activities is only available for less-than-truckload fleets. With the exception of household goods carriers, which weren't required to provide the information, significant financial data has been added to the Top 100 charts. Fleets designated as contract carriers aren't included since they're not required to file quarterly reports with the ICC.

INDUSTRY TRENDS AND STATISTICS

THE THRILL OF IT ALL

By **JERRY STANDLEY**, *Editor-In-Chief*, and **MATTHEW R. HOGAN**, *Market Research Editor*

The volatile truck and trailer markets performed below expectations in the moderate 1989 sales year. That trend prevailed through the first half of this year, but forecasters say it could be a wild ride from now on.

If you've ever played big stakes poker, you know what it's like to forecast commercial truck and trailer sales. It can be a thrilling, and discouraging, enterprise.

So, apparently, is the truck and trailer sales business. The outcome of 1989 sales efforts was discouraging for more than a few truck and trailer suppliers.

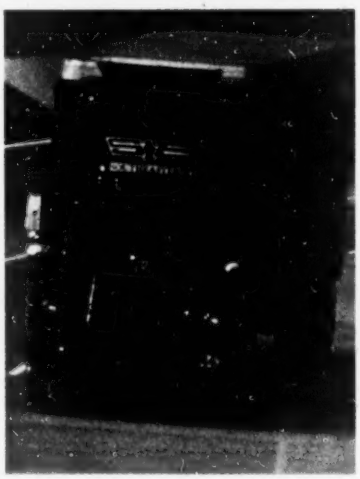
Fruehauf Trailers, the world's largest trailer producer, watched its 1989 sales plummet more than 26% (10,129 units) last year to 28,317. Second half sales for 1989 were off 39% (6,805 units). That's when Great Dane Trailers Inc. jumped from its perennial second place position behind Fruehauf, to became the leading U.S. trailer producer for the first time.

Great Dane sales outpaced Fruehauf in the second half of 1989 by 1,036 units (9.6%). Total 1989 sales, however, still have Fruehauf in the lead by more than 3,000 units. In 1984, Fruehauf produced almost 52,000 units, more than the other five biggest trailer producers combined, including Great Dane.

The most thrilling gain was at Monon, whose market position was lifted to number four from number 13, producing 11,382 units vs. 5,441 in 1988. For more information on what's happening in the trailer market, see the story on page 66 in CCJ's February issue: "Evolution in the Trailer Market."

While industry observers closely watched the race for number one in Class 8 sales between Seattle-based Paccar (Peterbilt and Kenworth) and Chicago-based Navistar (International), every GVW group was experiencing sales declines in 1989.

Factory sales of heavy trucks



(Class 6, 7, 8 combined) were off 11.5% (28,057 units). Combined 1989 Class 6, 7, 8 factory sales of the number one domestic truck producer, International, were 52,873, off 14% from 1988. International brand trucks continue to dominate, overwhelmingly, heavy truck sales.

Factory sales of Class 8 vehicles decreased 5.4% (7,249 units), Class 7 sales were off 9.8% (7,803 units), and Class 6 sales dropped 44.3% (13,005 units).

Peterbilt and Kenworth were the only two truck builders with increasing sales in 1989. Each one had modest gains of 5%. Their combined sales increases for 1989 (1,613 units) nearly nosed out Navistar as the number one Class 8 producer. In fact, Paccar did just that through the first four months of this year, but Navistar regained the sales lead in May.

Peterbilt and Kenworth also increased market share in 1989. Kenworth replaced Ford as the sixth largest producer, moving Ford to seventh place, while Peterbilt booted Mack from number three position to number five.

Mack Trucks, Allentown, Pa., led the Class 8 sales decline with a 17.7% drop (3,571 units). Ford wasn't far behind, with a 16.4% decline (2,560 units). Other declines were insignificant or did not result in a change in market share position for 1989.

Class 3 retail sales for 1989 were dominated by Isuzu and Dodge, which held 68.4% of the market combined. Dodge's share was 36.8%; Isuzu 31.7%. Class 3 is the Japanese stronghold, where four companies—Isuzu, Mitsubishi Fuso, Nissan Diesel and Hino—hold 44.9% of the market. Led by Isuzu's 6,066 units (70% of the total Japanese share), the combined group sold 8,604 Class 3 trucks last year.

Ford owns Class 4 with 95% of that market. Class 5 belongs to GM which holds 65% of that market with GMC and Chevrolet. Japanese suppliers hold 29.5% of the Class 5 share up from 24.2% in 1988.

Forecasting thrills

One irony in the wild ride expected for much of the 1990s is the eerie similarity among truck and

Continued

trailer sales forecasts. The various projections for this year, from different forecasters, vary slightly.

Factory sales of Class 8 trucks are expected to be flat or down slightly from 1989 levels at 130,000 units or lower. Class 7 will continue to fall off as it has each year, but perhaps at an accelerating rate to the benefit of Class 6.

The new commercial drivers license is required only for drivers of Class 7 and Class 8 commercial trucks. A few manufacturers are experiencing a small but distinct shift in new vehicle demand from Class 7 to Class 6. Some are attributing it to certain types of private fleets trying to avoid the complications of employees having to obtain a CDL.

Industry sources were hard pressed to explain it any other way. For instance, none were aware of a large fleet order that might skew the number artificially. But there is one other possible explanation.

"Another possible cause," according to Kenneth J. Kremar, director of capital goods and freight transportation at Economic Consultants and Planning, New York, "is the resurgence in agricultural equipment sales, a big Class 6 market."

While 1990 truck sales figures through May show a definite shift

Text continues on page 93

STATISTICAL ANALYSIS OF THE TRUCK INDUSTRY—PRIVATE AND FOR-HIRE CARRIAGE

FLEET SIZE	TOTAL FLEETS	TOTAL VEHICLES*	# OF STRAIGHT TRUCKS OPERATED	# OF TRACTORS OPERATED	# OF TRAILERS OPERATED	# OF BUSES OPERATED	# OF OFF-HIGHWAY VEHICLES OPERATED
500 & over	3,163	4,238,486	1,304,947	557,409	1,783,151	270,512	292,467
100–499	12,728	2,367,523	700,065	445,154	827,962	167,929	226,413
50–99	13,615	893,902	277,484	166,645	279,500	71,377	98,896
25–49	20,762	695,584	250,455	117,680	187,697	58,861	80,891
10–24	28,614	447,172	198,047	70,483	101,080	28,959	48,603
TOTAL	**78,882**	**8,642,667**	**2,730,998**	**1,357,371**	**3,179,390**	**597,638**	**747,270**
VOCATION OR BUSINESS							
Common/ Contract	17,737	2,596,002	138,712	709,064	1,657,567	40,749	49,910
Lease/Rental	3,350	909,061	262,211	202,845	408,871	12,358	22,776
Food Industry	9,259	695,002	226,326	102,894	284,224	5,210	46,348
Local, State & Federal Government	7,490	1,479,529	961,012	62,555	111,867	71,674	272,421
Construction/ Mining	11,865	586,350	245,587	60,429	112,395	3,868	164,071
Manufacturing/ Processing	6,449	396,262	106,335	69,659	165,206	8,907	46,155
Petroleum	2,966	274,511	59,560	36,135	165,125	1,706	11,985
Public Utility	3,784	589,688	423,706	13,424	79,842	5,370	67,346
Retail/ Wholesale Delivery	6,884	390,423	142,483	65,989	140,148	7,201	34,602
Sanitation & Refuse	1,110	64,084	41,485	7,277	10,814	160	4,348
Schools	4,685	345,549	52,368	8,339	8,629	263,640	12,573
Buses	1,248	185,058	9,192	1,623	2,453	169,504	2,286
Other	2,055	131,148	62,021	17,138	32,249	7,291	12,449
TOTAL	**78,882**	**8,642,667**	**2,730,998**	**1,357,371**	**3,179,390**	**597,638**	**747,270**

Source: CCJ Census of the Professional Truck Fleet Market, June 1990.

*—Does not include passenger cars.

This chart segments the motor carrier industry by fleet size and vocation or business. Substantial procedural difficulty in obtaining accurate vehicle counts within four categories—large (500+) private and for-hire carriers with numerous vehicle operating locations; lease/rental fleets; government fleets; and trailers—make it virtually impossible to eliminate a small amount of duplication remaining in the number of vehicles reported to be operated in *those market segments only!* All others vehicle counts are accurate as of June, 1990. CCJ estimates absolute maximum duplication in those four categories to be no higher than 10%. Those requiring a more detailed explanation for any of the above should contact Matt Hogan, market research editor, at 215-964-4521.

CARRIERS WITH FOR-HIRE AUTHORITY

Year	Class I (Over $5 Million)	Class II ($1-$5 Million)	Class III (Under $1 Million)	TOTAL*
1989	886	1,189	37,247	39,602
1988	889	1,179	37,182	39,609
1987	856	1,266	35,505	38,338
1986	947	1,387	33,903	36,948
1985	1,013	1,489	30,337	33,283
1984	1,088	1,554	27,370	30,481
1983	1,139	1,631	24,411	27,517
1982	1,144	2,139	22,059	25,722

Left: This data reflects post deregulation restructuring of Class 1, 2 and 3 for-hire carriers and private carriers with for-hire authority (Class 1 = revenues $5 million or more; Class 2 = between $1 million and $5 million; Class 3 = $1 million or less). The number of Class 3 carriers appears to have risen 69% from 1982 levels, but a certain amount of the increase in Class 3 is merely on paper, not in vehicles operating out on the highway, thus Class 3 numbers can be misleading. The same is true but less obvious for Class 1 and 2, which appear to have decreased in number. The Interstate Commerce Commission is considering an American Trucking Associations petition to reclassify Class 3 carriers which would help to remedy the situation.

*The carrier totals for 1989 reflect 280 Class 1 and 2 carriers operating, but exempted from filing with the Interstate Commerce Commission. The number of exempted Class 1 and 2 carriers in previous years totaled: 359 in 1988; 711 in both 1987 and 1986; 444 in 1985; 469 in 1984; 336 in 1983; 380 in 1982; 383 in 1981. *Source: Transportation Technology Services.*

SELECTED FINANCIAL DATA FROM CLASS 1 AND CLASS 2 COMMON CARRIERS

	All General Freight & Specialized Carriers 1989 (1988)	1988 (1987)	Percent of Change	Percent of Revenue
Number of Carriers	112	112		
[illegible]	$13,066,666	$12,328,171	5.99%	100.00%
[illegible]	$1,195,252	$1,150,386	3.90%	9.15%
[illegible]	$4,958,404	$4,591,354	7.99%	37.95%
[illegible]	$1,862,682	$1,651,105	12.81%	14.26%
[illegible]	$8,016,338	$7,392,845	8.43%	61.35%
[illegible]	$1,187,213	$1,036,672	14.52%	9.09%
[illegible]	$575,312	$523,170	9.97%	4.40%
[illegible]	$434,819	$397,449	9.40%	3.33%
[illegible]	$331,305	$309,692	6.98%	2.54%
[illegible]	$199,515	$195,083	2.27%	1.53%
[illegible]	$584,693	$539,576	8.36%	4.47%
[illegible]	$998,398	$1,005,225	-0.68%	7.64%
[illegible]	$138,310	$130,334	6.12%	1.06%
[illegible]	$111,532	$104,294	6.94%	0.85%
[illegible]	$12,577,435	$11,634,340	8.11%	96.26%
[illegible]	$489,231	$693,831	-29.49%	3.74%
[illegible]	$102,343	$83,223	22.97%	0.78%
[illegible]	$134,415	$298,771	-55.01%	1.03%
[illegible]	$35,112	$106,615	-67.07%	0.27%
[illegible]	$287,585	$418,452	-31.27%	2.20%
[illegible]	96.26	94.37		
[illegible]	2.20	3.39		
Vehicle Miles Traveled	4,031,234	3,868,062	6.64%	
[illegible]	83,690	82,536	1.40%	

This chart compares totals and percentage changes in selected 1989 and 1988 financial items for 112 Class 1 & 2 Less-than-truckload common carriers. Changes in Interstate Commerce Commission (ICC) financial reporting requirements resulted in the exclusion of truckload carriers that were included in the 1988 charts. Data is compiled by Transportation Technology Services, based on carrier financial reports (Form QFR) to the ICC by Class 1 and 2 "Instruction 27" carriers (75% or greater revenues derived from general commodity freight). Statistics from United Parcel Service, contract carriers and household goods movers are excluded from this chart. To provide accurate two-year comparisons, figures from 1988 are restated on the basis of those same carriers filing 1989 reports with the ICC.

15-YEAR FACTORY SALES OF TRUCKS BY GVW (1975 through 1989)

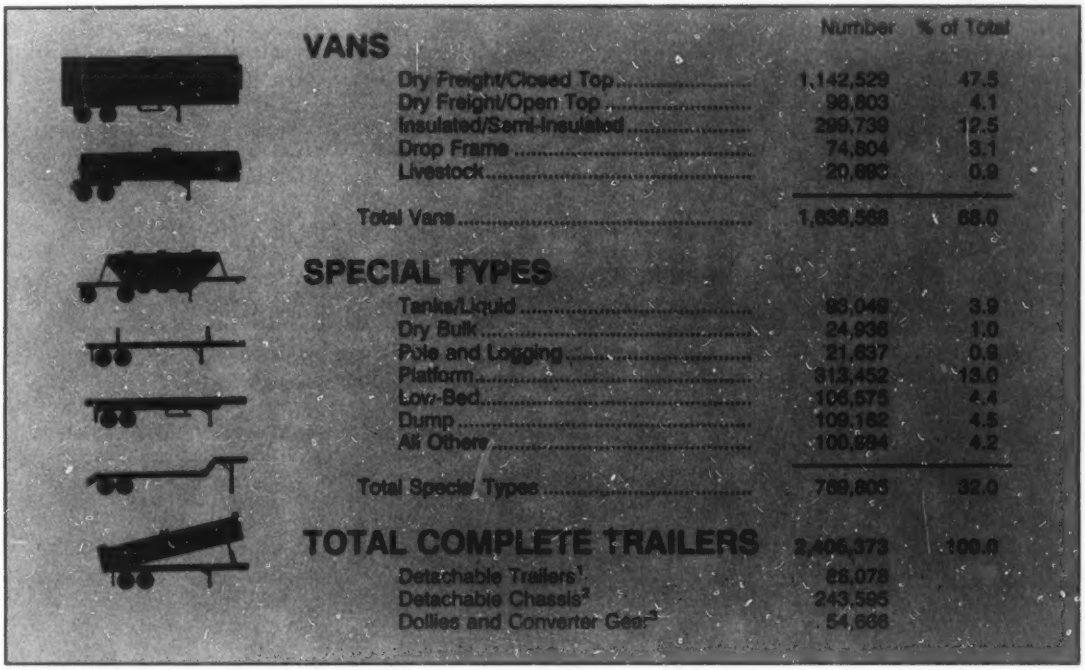
(Includes U.S. total domestic and export sales. Excludes tactical military vehicles and buses.)

	No. of Units	% of Total
CLASS 1 6,000 lb & Less	22,974,943	51.68%
CLASS 2 6,001-10,000 lb	17,328,853	38.98%
CLASS 3 10,001-14,000 lb	178,838	0.40%
CLASS 4 14,001-16,000 lb	12,519	0.03%
CLASS 5 16,001-19,500 lb	81,165	0.18%
CLASS 6 19,501-26,000 lb	1,033,842	2.33%
CLASS 7 26,001-33,000 lb	897,641	2.02%
CLASS 8 33,001 lb & Over	1,951,349	4.39%
TOTAL	44,459,150	100.00%

R.L. Polk estimates the total number of Class 1 - 8 trucks in use is 53,201,000. The R.L. Polk total includes imported vehicles, school buses and private fleet buses, but does not include municipal buses. The CCJ total listed above does not include buses or imports, and does not reflect a scrappage rate, which R.L. Polk estimates at 4.4% annually.

Source: Motor Vehicle Manufacturers Association, CCJ Marketing Dept.

BREAKDOWN OF NEW TRAILER SHIPMENTS (1975 through 1989)



	Number	% of Total
VANS		
Dry Freight/Closed Top	1,142,529	47.5
Dry Freight/Open Top	98,803	4.1
Insulated/Semi-Insulated	299,739	12.5
Drop Frame	74,804	3.1
Livestock	20,693	0.9
Total Vans	1,636,568	68.0
SPECIAL TYPES		
Tanks/Liquid	93,049	3.9
Dry Bulk	24,936	1.0
Pole and Logging	21,637	0.9
Platform	313,452	13.0
Low-Bed	106,575	4.4
Dump	109,182	4.5
All Others	100,994	4.2
Total Special Types	769,805	32.0
TOTAL COMPLETE TRAILERS	2,406,373	100.0
Detachable Trailers[1]	26,078	
Detachable Chassis[2]	243,595	
Dollies and Converter Gear[3]	54,636	

Source: Industry Div., Bureau of the Census, Dept. of Commerce. Compiled by CCJ Marketing Dept. -[1]Mostly container units. -[2]Most used with containers. -[3]Separate axle and fifth wheel assembly used to connect two semi-trailers for twin trailer operations.

NEW TRAILER SHIPMENTS BY TYPE

Type of Trailer	1989	1988	1987	1986	1985
VANS					
Dry Freight/Closed Top	86,421	96,390	99,054	91,571	90,489
Dry Freight/Open Top	2,986	3,254	2,776	2,948	3,005
Insulated/Semi-Insulated	26,216	24,862	26,650	21,626	24,138
Drop Frame	6,689	5,974	5,237	3,782	7,867
Livestock	1,642	1,511	1,663	2,118	1,169
Total Vans	123,954	131,991	135,380	122,045	126,668
SPECIAL TYPES					
Tanks/Liquid	5,100	5,075	4,636	4,370	5,307
Dry Bulk	953	1,065	1,358	1,253	1,520
Pole and Logging	556	710	832	1,060	1,491
Platform	17,672	17,648	14,975	13,309	16,842
Low-Bed	8,548	10,508	8,254	14,627	14,317
Dump	7,518	9,295	8,181	8,095	8,384
All Others	5,698	10,191	6,525	4,510	5,279
Total Special Types	46,045	54,492	44,762	47,224	53,140
TOTAL COMPLETE TRAILERS	**169,999**	**186,483**	**180,142**	**169,269**	**179,808**
Detachable Trailers[1]	--	5,223	438	417	252
Detachable Chassis[3]	21,042 [2]	37,729	23,014	15,046	28,876
Dollies/Converter Gear[4]	2,175	2,917	4,614	4,567	4,123
TOTAL	**23,217**	**45,869**	**28,066**	**20,030**	**33,251**

Source: Industry Div., Bureau of the Census, Dept. of Commerce. Compiled by CCJ Marketing Dept.
[1] – Mostly container units. [2] – Figure combined with detachable trailers for 1989. [3] – Primarily for use with containers. [4] – Separate axle and 5th wheel assembly for converting semi-trailer into full trailer for twin-trailer operations.

The trailer market performed as expected last year, according to the most current revised Dept. of Commerce (DOC) statistics. Total complete trailer sales decreased 8.8% (16,484 units). Dry freight van sales were down combined 10.2% (10,237 units) compared to 1988, offsetting rises in reefer, drop frame and livestock van sales (5.4%, 12% and 8.7% respectively). It was a bad year for special type trailers, except platforms, which held steady from '88 to '89. As a group, special types ended the year off 15.5% (8,447 units). The DOC expects to release more revised 1989 statistics the end of this month. Officials at Economic Consulting and Planning, Inc. of New York, who present the annual trailer market forecast at the Truck Trailer Manufacturers Assoc. annual convention, say the trailer sales outlook is positive, for at least the next several years, beginning with the second half of 1990.

DIESEL ENGINES USED IN TRUCKS

(Factory sales from U.S. plants including exports)

Make of Truck		Cat	Cummins	Detroit Diesel	Internat'l Navist	Mack	All Other	Total
Chevrolet	1989	1,882	–	9,971	–	–	–	**11,853**
	1988	1,428	–	22,595	–	–	–	24,023
Ford	1989	4,831	7,382	83	63,691	–	31,030	**107,217**
	1988	8,706	9,580	398	54,574	–	32,161	105,397
Freightliner	1989	8,389	11,969	3,348	–	–	–	**23,706**
	1988	7,444	14,948	1,296	–	–	–	23,688
GMC	1989	4,436	3,588	10,292	–	–	–	**18,316**
	1988	2,863	1,719	13,306	–	–	13	17,901
International	1989	1,530	19,969	–	39,568	–	–	**61,067**
	1988	1,517	21,969	5	46,520	–	–	70,011
Jeep Corp.	1989	–	–	–	–	–	–	**0**
	1988	–	–	–	–	–	3,917	3,917
Kenworth	1989	6,228	9,020	1,165	–	–	–	**16,413**
	1988	5,552	9,286	636	–	–	–	15,474
Mack	1989	149	155	–	–	18,057	191	**18,552**
	1988	251	203	–	–	22,112	102	22,668
Mercedes-Benz	1989	–	–	–			2,143	**2,143**
	1988	–	–	–			3,221	3,221
Peterbilt	1989	12,141	5,768	921	–	–	–	**18,830**
	1988	11,031	6,471	468	–	–	–	17,970
Volvo GM	1989	4,258	11,243	3,120		–	504	**19,125**
	1988	4,967	12,059	2,529	–	–	282	19,837
Others[1]	1989	316	345	128	–	–	–	**789**
	1988	296	5,020	76	–	–	–	5,392
Total	**1989**	**44,160**	**69,439**	**29,028**	**121,516**	**18,057**	**33,868**	**298,011**
	1988	44,055	81,233	41,309	123,206	22,112	39,696	329,499

Left: Diesel engine sales dropped 9.5% in 1989, following a similar slowdown in truck sales for that year. But the market leader, International, continued to gain share, increasing to 40.7% from 37% in 1988. The nearest competitor, Cummins, has 23.3% of the market. Caterpillar's share rose slightly to 14.8% from 13.4% in 1988. On the other hand, sales of Detroit Diesels dropped 30% in 1989. That figure is somewhat artificial, because of a 10,000 unit military order for engines that were produced in 1988, and were reflected in the 1988 totals. Excluding the 1988 military engine order, sales of Detroit Diesels have slipped 43.2% (25,163 units) since 1987.

Source: Motor Vehicle Manufacturers Association. [1] – Others include: Oshkosh and Marmon. [2] – All Others includes: Ford, Isuzu, Mercedes-Benz, Scania-Vabis, Volvo, Renault (Mack) and GMC/Deere. Reporting firms do not represent entire industry.

Below: This chart illustrates the six-year performance of Class 1-8 domestic factory sales of trucks. Class 8 truck sales, the industry bellweather, were down 5.4% (7,249 units) vs. 1988. Most notable is the 44% drop in Class 6 sales. However, International trucks, from Navistar, in 1988, accounted for two-thirds of a dramatic 71.6% jump in Class 6 sales (12,240 units). Most of that was in the form of a large volume order for its 97-in. BBC model. The 1989 figure for Class 6 represents a return to more normal levels. Class 7 sales continue downward, this time down 9.9% (7,803 units).

DOMESTIC TRUCK FACTORY SALES BY GVW

Class 1 (6000 lb and less)						
Total Sales	2,447,962	2,496,648	2,270,566	1,964,832	1,854,901	1,610,835
Diesel Sales	107	86	1,813	4,999	9,663	15,234
% Diesel	–	–	0.1%	0.3%	0.5%	0.9%
Class 2 (6001-10,000 lb)						
Total Sales	1,057,067	1,020,515	976,803	927,462	989,633	997,626
Diesel Sales	88,636	79,535	85,125	96,443	123,882	122,995
% Diesel	8.4%	7.8%	8.7%	10.4%	12.5%	12.3%
Class 3-4 (10,001-16,000 lb)						
Total Sales	54	86	476	–	19,397	5
Diesel Sales	54	86	322	–	5,870	–
% Diesel	100%	100.0%	67.5%	–	30.3%	0.0%
Class 5 (16,001-19,500 lb)						
Total Sales	4,197	5,224	5,841	5,749	5,123	5,502
Diesel Sales	3,559	1,599	431	–	–	–
% Diesel	84.8%	30.6%	7.4%	–	–	–
Class 6 (19,501-26,000 lb)						
Total Sales	16,327	29,332	17,092	17,846	25,810	29,273
Diesel Sales	10,475	17,429	9,184	9,265	14,253	13,789
% Diesel	64.2%	59.4%	53.7%	51.9%	55.2%	47.1%
Class 7 (26,001-33,000 lb)						
Total Sales	71,340	79,143	84,341	77,597	81,122	74,445
Diesel Sales	55,568	56,574	56,719	47,694	50,492	43,412
% Diesel	71.5%	71.5%	67.2%	61.5%	62.2%	58.3%
Class 8 (33,001 lb & Over)						
Total Sales	127,880	135,129	121,425	103,216	120,941	138,584
Diesel Sales	127,826	134,981	121,192	102,671	120,311	137,692
% Diesel	99.9%	99.9%	99.8%	99.5%	99.5%	99.4%

TRUCK FACTORY SALES

(U.S. domestic only; excluding tactical military vehicles)

	Class 1 Up to 6,000 lb		Class 2 6,001 - 10,000 lb		Class 3 10,001 - 14,000 lb		Class 4 14,001 - 16,000 lb		Class 5 16,001 - 19,500 lb		Class 6 19,501 - 26,000 lb	
Make / Year	1989	1988	1989	1988	1989	1988	1989	1988	1989	1988	1989	1988
Chevrolet	845,085	860,869	306,861	340,524	–	–	–	–	84	203	2,063	2,178
GMC	208,058	201,005	97,904	102,454	–	–	–	–	4,113	5,021	2,267	7,560
Freightliner	4,270	–	–	–	–	–	–	–	–	–	–	–
Kenworth	6,765	–	–	–	–	–	–	–	–	–	–	–
Peterbilt	309,482	313,388	51,753	31,895	–	–	–	–	–	–	–	–
Ford	758,431	826,121	590,647	532,026	–	–	–	–	–	–	4,566	5,367
Navistar Int'l	–	–	–	–	–	–	–	–	–	–	–	–
Mack	–	–	–	–	–	–	54	86	–	–	6,682	13,157
Dodge	192,814	199,346	9,902	13,616	–	–	–	–	–	–	–	–
Volvo GM	–	–	–	–	–	–	–	–	–	–	–	–
Autocar	–	–	–	–	–	–	–	–	–	–	–	–
Others	–	–	–	–	–	–	–	–	–	–	749	1,070
Toyota	–	–	–	–	–	–	–	–	–	–	–	–
Isuzu GM	–	–	–	–	–	–	–	–	–	–	–	–
Others	123,057[2]	95,919[2]	–	–	–	–	–	–	–	–	–	–
Total	2,447,962	2,496,648	1,057,067	1,020,515	–	–	54	86	4,197	5,224	16,327	29,332

TRUCK RETAIL SALES

(Data includes built-up and CKD units assembled in the U.S.)

	Class 1 Up to 6,000 lb		Class 2 6,001 - 10,000 lb		Class 3 10,001 - 14,000 lb		Class 4 14,001 - 16,000 lb		Class 5 16,001 - 19,500 lb		Class 6 19,501 - 26,000 lb	
Make / Year	1989	1988	1989	1988	1989	1988	1989	1988	1989	1988	1989	1988
Chrysler	1,812	–	–	–	–	–	–	–	–	–	–	–
Ford	417,319	465,550	124,064	101,683	7,046	3,803	–	–	–	–	–	–
Chevrolet	184,943	192,273	–	–	–	–	–	–	–	–	–	–
GMC	238,455	238,751	10,715	14,703	–	–	–	–	–	–	–	–
Total Domestic	**842,529**	**896,574**	**134,779**	**116,389**	**7,046**	**3,803**	–	–	–	–	–	–
Dodge	716,141	770,909	660,205	671,480	–	–	25,648	19,698	–	–	9,526	10,833
Plymouth	–	–	–	–	–	–	–	–	–	–	–	–
Chevrolet	928,050	921,698	381,089	413,942	698	767	–	–	234	249	7,424	8,093
GMC	231,079	220,130	121,318	131,293	1,391	1,576	–	–	4,458	5,347	5,371	11,366
Freightliner	2,122	–	–	–	–	–	–	–	–	–	–	–
Kenworth	3,226	–	–	–	–	–	–	–	–	–	–	–
Total GM	**1,164,477**	**1,141,828**	**502,407**	**545,235**	**2,089**	**2,343**	–	–	**4,692**	**5,596**	**12,795**	**19,459**
Ford	–	–	–	–	262	6	–	–	465	603	503	482
Isuzu	–	–	–	–	6,066	4,785	653	505	230	137	743	774
Mazda	–	–	–	–	1,422	1,598	504	705	256	359	175	154
Mitsubishi	–	–	–	–	–	–	–	–	–	–	–	–
Nissan	–	–	–	–	–	–	–	–	–	–	1,819	2,078
Toyota	–	–	–	–	–	–	–	–	–	–	796	1,124
Toyota Foot	–	–	–	–	1,694	1,624	–	–	686	530	317	234
Volvo GM	–	–	–	–	–	–	226	273	152	304	11,795	18,142
Others	130,978	116,717	–	–	–	–	–	–	–	–	–	–
Navistar Int'l	–	–	–	–	582	69	–	–	762	739	435	287
Hino	–	–	–	–	–	–	–	–	–	–	–	–
Isuzu	–	–	–	–	–	–	–	–	–	–	–	–
Suzuki	369	–	–	–	–	–	–	–	–	–	–	–
Volvo GM Heavy	–	–	–	–	–	–	–	–	–	–	–	–
Subaru Isuzu	–	–	–	–	–	–	–	–	–	–	–	–
Volvo Domestic	–	–	–	–	–	–	–	–	–	–	224	32
Total	2,854,494	2,926,028	1,297,391	1,333,101	19,161	14,228	27,031	21,181	7,243	8,268	39,128	53,599

Source: MVMA. These data are 1988 and '89 factory sales from U.S. plants only and do not include sales of vehicles resulting from joint venture agreements between foreign and domestic suppliers. MVMA reporting firms do not represent entire industry. Volvo GM does not report separate factory sales figures for Class 8 Volvo, WhiteGMC and Autocar trucks (combined as 17,030 units above). "Others" include Nissan, Marmon and Oshkosh. A more complete picture of U.S. market truck sales is reflected in the Retail sales chart.
-[1]1989 Minivans classified as trucks. -[2]Nissan Production figures.

Class 7 25,001 - 33,000 lb		Class 8 33,001 lb +		Grand Total		GVW Sales Year
1989	1990	1989	1990	1989	1990	
7,721	8,423	–	243	1,161,814	1,212,440	Chevrolet
11,817	14,788	98	647	324,257	331,475	GMC
–	–	–	–	4,270	–	Oldsmobile
–	–	–	–	6,765	–	Pontiac
–	–	–	–	361,235	345,283	Chrysler
28,699	31,181	12,963	15,523	1,395,306	1,410,218	Ford
–	–	22,914	22,970	22,914	22,970	Freightliner
21,922	23,075	24,269	25,307	52,927	61,625	International
–	–	–	–	202,716	212,962	Jeep
–	–	15,433	14,663	15,433	14,663	Kenworth
–	–	16,642	20,213	16,642	20,213	Mack
1,181	1,676	–	–	1,930	2,746	Mercedes-Benz
–	–	17,776	16,933	17,776	16,933	Peterbilt
–	–	17,030	17,877	17,030	17,877	Volvo GM
–	–	755	753	123,812	96,672	Others
71,340	79,143	127,880	135,129	3,724,827	3,766,077	TOTAL

Class 7 25,001 - 33,000 lb		Class 8 33,001 lb +		Grand Total		GVW Sales Year
1989	1990	1989	1990	1989	1990	
0	0	0	0	1,612	0	Chrysler
0	0	0	0	548,429	571,036	Dodge
0	0	0	0	184,943	192,273	Plymouth
0	0	0	0	249,170	253,454	Jeep
0	**0**	**0**	**0**	**984,354**	**1,016,763**	**Total Chrysler**
32,531	35,437	13,995	14,858	1,458,046	1,523,215	Ford
0	0	23,381	24,164	23,381	24,164	Freightliner
8,272	9,469	0	273	1,325,767	1,354,491	Chevrolet
12,780	15,372	0	1,090	376,397	386,174	GMC
0	0	0	0	2,122	0	Oldsmobile
0	0	0	0	3,226	0	Pontiac
21,052	**24,841**	**0**	**1,363**	**1,707,512**	**1,740,665**	**Total GM**
911	1,032	0	0	2,141	2,123	Hino
669	486	0	0	8,361	6,687	Isuzu
0	0	0	0	2,357	2,816	Isuzu
388	504	17,806	16,700	18,194	17,204	Kenworth
2,417	2,807	19,035	21,846	23,271	26,731	Mack
1,241	1,882	0	0	2,037	3,006	Mercedes-Benz
611	613	0	0	3,308	3,001	Mitsubishi Fuso
31,341	32,382	34,671	33,808	78,185	84,909	International
0	0	0	0	130,978	116,717	Nissan
611	948	0	0	2,390	2,043	Nissan Diesel
546	547	16,557	16,154	17,103	16,701	Peterbilt
0	0	116	163	116	163	Scania
0	0	0	0	369	0	Suzuki
1,012	1,452	17,340	17,089	18,352	18,541	Volvo GM Heavy
0	0	1,419	1,440	1,419	1,440	Western Star
116	111	748	776	1,088	919	Other Domestic
93,446	103,042	145,068	148,361	4,482,962	4,607,808	TOTAL

THE THRILL OF IT ALL

Continued from page 72

of several thousand units to Class 6, most agree it's too soon to say that this shift in GVW class will be significant, or sustained, for whatever reason.

If that scenario plays out, it may offer some relief for truck dealers, the most discouraged segment of the industry. The American Truck Dealers division of the National Automobile Dealers Association, McLean, Va., expects 10% or more of their members to fold this year. A published report on an ATD survey shows that 36.7% lost money in new vehicle sales, 63.3% ran in the red on used vehicles and 33.7% lost money in service sales.

And they find little that is thrilling in the wild ride predicted for much of the rest of the decade, according to George Rafferty, a Chicago Kenworth dealer and ATD's current chairman.

"A big market doesn't necessarily bode well for dealers. The problem is trying to convince the vehicle OEMs not to sell directly to the customer. And I'm not optimistic that anything's going to change in that area."

Factory vs. retail sales

Now for the real story...almost.

Factory sales figures don't tell the story of truck sales in the U.S. marketplace. For instance, factory sales data do not reflect 25,648 Ford Class 4 trucks manufactured in Canada and imported for sale here.

That's one of the reasons we added the new retail sales chart to this special section. Retail sales figures published by the Motor Vehicle Manufacturers Association provide a truer picture of truck sales in America than factory sales. For instance, the data show 27,031 vehicles sold as Class 4 (Ford and others) vs. 54 in factory sales data) because retail sales figures include imports from Canada and other data not reflected in the factory sales figures.

Retail sales figures have only recently been published by the Motor Vehicle Manufacturers Association. They provide a much more complete picture than factory sales of truck market activity in the U.S., but not the entire picture. For instance, retail sales data do not include U.S. sales for Toyota, Subaru, Mazda and certain other vehicles, like Isuzu's Trooper and mini-pickup models. Those missing vehicles account for many thousands of domestic small truck sales, mostly in GVW Class 1 and 2. A large number of those are for private use, however, not commercial. □

By NANCY O'BRIEN
Contributing Editor

Are you making as much as your peers? To compare their salaries with yours, check the compensation figures noted below. Based on a survey of 570 motor carriers, the data for 17 managerial and supervisory job titles is broken down by fleet size and type.

WHERE THE MONEY IS!

Shooting for big bucks in the motor carrier industry? Then set your sights on being president of a for-hire carrier with 500 or more vehicles.

Presidents of major common carriers make more money than persons with titles like owner and partners. That's because owners and partners usually run smaller fleets.

Those were just two of the conclusions reached after analyzing the 250-page, data-packed, management compensation and benefits study recently conducted by Abbott, Langer & Associates of Crete, Ill. Sponsored by *Commercial Carrier Journal* and directed by Steven Langer Ph.D., the research was based on a survey of 570 randomly-selected operations that weren't limited to freight-hauling motor carriers.

Also included in the independent study were truck and bus fleets operated by: utility companies, school districts, transit authorities, the military forces, construction outfits, municipalities and other government agencies. Research results are broken down by size, revenue and type of fleet, and the region, state and/or metropolitan area in which the respondents operate.

Compensation figures quoted in the study reflect salary plus cash bonuses and profit sharing for 17 managerial and supervisory job titles. They are median averages, not mean averages. Medians often are more accurate than averages because just one unusually low or high number can easily throw the mean average out of whack.

Thus the $76,976 median average compensation figure for trucking company presidents noted in the survey reflects the income point at which 50% of the survey's presidential respondents earn more and 50% earn less.

Other median compensation figures noted by job title in the study are: owner/senior partner, $65,000; executive vice president, $56,000; vice president of transportation, $55,000; vice president-finance/finance director, $49,791; sales/marketing manager, $48,000; vice president-maintenance/maintenance director, $46,000; maintenance superintendent, $43,000; equipment manager, $39,600; fleet manager, $36,000; operations manager, $35,432; vice president-safety/safety director, $35,183; maintenance foreman, $32,891; equipment specialist, $30,500; maintenance manager, $30,000; fleet superintendent, $30,000.

Don't forget that as managers work their way up the corporate ladder, their perks increase, too. And those goodies aren't reported as income to the IRS.

Impacts of type, size, locale

Before you start updating your resume, you should know that being president of a private or for-hire fleet doesn't guarantee that you've entered the golden circle of financial heavy hitters. Presidential salaries vary widely, ranging in the study from $184,000 to $26,000. And fleet superintendents' salaries reported in the study varied between $50,000 and $17,000.

Compensation variations like those usually are based on the type and size/revenue of fleet, plus operating locale.

An analysis of compensation data for 17 key trucking industry job titles, also determined that:

- For-hire carriers pay their employees 7% more, on average, than private fleets.

For some job titles, however, private carriers pay more. For example, the median salary of a fleet maintenance foreman working for a for-hire carrier is $25,000. But his counterpart at a private fleet earns $33,672.

- Fleets with 500 or more vehicles pay employees 23% more than fleets with less than 100 vehicles.

But that compensation difference doesn't hold true for all positions. For instance, a fleet maintenance foreman who works for a company with 500 or more vehicles earns 54% more—$34,800 vs. $22,530—than his counterpart at a company with fewer than 100 vehicles. On the other hand, an equipment manager earns 7% *less* —$39,600 vs. $37,000—if he works for a company with 500 or more vehicles.

- The Pacific region provides the highest trucking management salaries in the nation. West Coast salaries are 30% higher than the Midwest, the low end of the geographic pay scale.
- Most of the fleets surveyed have pension plans. Employers' pension fund contributions average between 6% and 7.9% of employee salaries. And employees'

$ MANAGEMENT SALARY SURVEY

retirement income equals between 51% and 74% of their highest average earnings.

More than half of the for-hire carriers pay all of the pension premium. But over 50% of private fleets pay only part of the premium.

• Bonuses and profit sharing are offered by less than half the companies surveyed.

• More than half of the respondents pay 100% of employees' premium for major medical coverage—65% of for-hire carriers and 57% of private fleets. But less than half—39% of for-hire carriers and 30% of private fleets—cover 100% of dependents' health insurance. And 20% of the carriers responded that they don't pay for any dependent coverage.

Job title definitions

The bar charts show the breakdown of trucking industry managers' median compensation levels by job title. The titles and their definitions, for purposes of this survey, are:

1. Owner/Senior Partner: Holds the sole or largest financial interest in the organization. Directs the organization's day-to-day activities. In smaller fleets, may act as president, general manager, operations manager, maintenance manager and/or chief financial officer.

2. President: Has little or no financial interest in the organization. Functions as the highest manager of an organization in which the owner or partners don't play a managerial role. Directs all of the organization's day-to-day

Continued

Before you start updating your resume, you should know that being president of a fleet doesn't guarantee that you've entered the golden circle of financial heavy hitters. Presidential salaries vary widely, ranging in the study from $184,000 to $26,000.

activities. Represents the organization to the public.

3. Executive Vice President: Responsible for the implementation of policies and procedures set by the Owner/Senior Partner or President. Serves as Acting President in the absence thereof. Usually directs the day-to-day activities of one or more specific areas of the organization.

4. General Manager: Responsible for the implementation of policies and procedures set by the Owner/Senior Partner or President. Does not serve as Acting President in the President's absence. Usually directs day-to-day activities of all or most of the organization.

5. Vice President-Finance or Finance Director: Responsible for developing financial policies and procedures and directing their implementation. Supervises the financial and accounting activities of the organization.

6. Sales/Marketing Manager: Responsible for the supervision of the sales staff and planning and direction of all sales, marketing and related activities. Coordinates and supervises all activities dealing with market research, product development, sales promotion, advertising and market development and/or expansion.

7. Vice President-Safety or Safety Director: Develops, directs and oversees compliance with federal, state and local safety regulations in terms of employee and vehicle safety.

8. Vice President-Transportation: Oversees all aspects of vehicle operations for the organization, including purchasing, budgeting, maintenance, traffic and labor relations.

9. Operations Manager: Responsible for the daily operation of the company vehicles. Manages traffic of vehicles and freight. May manage one or more terminals.

10. Equipment Manager: Responsible for the company's vehicles, including purchasing, budgeting, maintenance and day-to-day operation.

11. Equipment Specialist: Under the direction of the Equipment Manager, is responsible for the day-to-day operation of company vehicles.

12. Vice President-Maintenance or Director of Maintenance: Oversees all maintenance on company vehicles. Duties may include purchasing of parts, components, supplies and vehicles. Duties may include labor relations and the training of mechanics. Responsible for other fleet activities such as operations, safety, finance/accounting or marketing/sales.

13. Maintenance Superintendent: Under the direction of the Vice President-Maintenance or Director of Maintenance, is responsible for the maintenance of all company vehicles. Duties may include purchasing of parts, components, supplies and vehicles. Duties may include labor relations and the training of mechanics. Typically directs the activities of 24 or more maintenance employees through two or more levels of subordinate managers/supervisors/foremen. Responsibilities don't include other fleet activities such as operations, safety, finance/accounting or marketing/sales.

14. Maintenance Manager: Under the direction of the Vice President-Maintenance or Director of Maintenance, is responsible for the maintenance of all company vehicles. Duties may include purchasing of parts, components, supplies and vehicles. Duties may include labor relations and training of mechanics. Typically directs the activities of 12 to 48 maintenance employees through one level of subordinate managers/supervisors/foremen. Responsibilities don't include other fleet activities such as operations, safety, finance/accounting or marketing/sales.

15. Fleet Superintendent: Under the direction of the Vice President-Maintenance or Director of Maintenance or the Operations Manager, is responsible for day-to-day maintenance of company vehicles. Duties may include purchasing of parts, components, supplies and vehicles. Duties may include labor relations and the training of mechanics. Typically directs the activities of 24 or more maintenance employees through two or more levels of subordinate

How to buy a copy of the complete study

Copies of the 250-page statistical analysis of trucking industry management compensation and benefits are available for $295 each. They can be purchased from Abbott, Langer & Associates, 548 First St., Crete, Ill. 60417. Phone: 708-672-4200.

MANAGEMENT $ALARY SURVEY

managers/supervisors/foremen. Responsible for other fleet activities such as operations, safety, finance/accounting or marketing/sales.

16. Fleet Manager: Under the direction of the Vice President-Maintenance or Director of Maintenance, is responsible for day-to-day maintenance of company vehicles. Duties may include purchasing of parts, components, supplies and vehicles. Duties may include labor relations and the training of mechanics. Typically directs the activities of 12 to 48 maintenance employees through one level of subordinate managers/supervisors/foremen. Responsible for other fleet activities such as operations, safety, finance/accounting or marketing/sales.

17. Fleet Maintenance Foreman: Under the direction of the Vice President-Maintenance or Director of Maintenance, the Fleet Manager or the Maintenance Manager. Is responsible for day-to-day maintenance of company vehicles. Duties may include purchasing of parts, components, supplies and vehicles. Duties may include labor relations and the training of mechanics. Typically directs the activities of four to twelve maintenance employees. Has no subordinate levels of supervisors, except, possibly, one or more Maintenance Mechanic Leadmen. □

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